DOCUMENT RESUME

ED 134 140 IR 004 296

TITLE	CLENE: Continuing Library Education Network and Exchange Proceedings (Second CLENE Assembly, July 16-17, 1976).
INSTITUTION	Continuing Library Education Network and Exchange, Washington, D.C.
PUB DATE	Jul 76
NOTE	206p.; Some pages may be marginally legible due to print quality of original
AVAILABLE FROM	CLENE, 620 Michigan Avenue, N.W., Washington, D.C. 20064
EDRS PRICE	MF-$0.83 HC-$11.37 Plus Postage.
DESCRIPTORS	Adult Education; Conferences; *Librarians; *Library Education; *Professional Continuing Education; Teacher Workshops
IDENTIFIERS	CLENE; Continuing Library Education Network and Exchange

ABSTRACT

This meeting was designed to serve as an up-to-date learning resource for those involved in library education and as a centralized medium for the demonstration of projects and activities. Included in the report are discussions on (1) Principles of Adult Education Programming, (2) Needs Assessment Techniques, (3) Designing Education Plans for Training, (4) A Model Program of Continuing Education for Staff Development for Academic Librarians, (5) Non-traditional Educational Techniques, (6) Development of Instructional Modules, (7) How to Plan and Conduct Continuing Education Workshops and Institutes, (8) Initiating a Statewide Program, and (9) The Knowledge Broker. Closing statements by the 1975-1976 president of CLENE are included as well as the address of the incoming president. Appendices include a list of participants in this meeting and the CLENE fact sheet which lists goals and objectives of the organization. (AP)

****
* Documents acquired by ERIC include many informal unpublished *
* materials not available from other sources. ERIC makes every effort *
* to obtain the best copy available. Nevertheless, items of marginal *
* reproducibility are often encountered and this affects the quality *
* of the microfiche and hardcopy reproductions ERIC makes available *
* via the ERIC Document Reproduction Service (EDRS). EDRS is not *
* responsible for the quality of the original document. Reproductions *
* supplied by EDRS are the best that can be made from the original. *
****

ED134140

CLENE:
CONTINUING LIBRARY EDUCATION NETWORK AND EXCHANGE

PROCEEDINGS

SECOND CLENE ASSEMBLY

PALMER HOUSE
CHICAGO, ILLINOIS
JULY 16-17, 1976

U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
NATIONAL INSTITUTE OF EDUCATION

THIS DOCUMENT HAS BEEN REPRODUCED EXACTLY AS RECEIVED FROM THE PERSON OR ORGANIZATION ORIGINATING IT. POINTS OF VIEW OR OPINIONS STATED DO NOT NECESSARILY REPRESENT OFFICIAL NATIONAL INSTITUTE OF EDUCATION POSITION OR POLICY

Continuing Library Education Network and Exchange
Box 1228, 620 Michigan Avenue, N.E., Washington, D.C. 20064

IR 004 296

FOREWARD

Acknowledgements

These Proceedings of the second CLENE Assembly, July 16-17, 1976 in Chicago, prepared with financial assistance from the membership dues of the member states[1] of the Continuing Library Education Network and Exchange (CLENE), include the papers of the major presenters, reports from the various workshops and the taped records of the presentations at the Assembly. CLENE is most appreciative to Dr. Kieth Wright and Mary Feldman for volunteering to edit the Proceedings and assuming the responsibility of the presentation of the manuscript in camera-ready copy for duplication. The services of the recorders of the workshop sessions are greatly appreciated, too, as those sessions were not taped. The cassette tapes of the Assembly, except for the workshops, are available from: Audio Archives, Inc., One IBM Plaza, Chicago, Illinois 60611.

Task Force for Planning the First Assembly

The Assembly Task Force deserves particular credit for planning and implementing the sessions. The members of this group were: Ruth J. Patrick, Chairperson, Patricia Broderick, Frank Birmingham, Muriel Fuller and Travis Tyer. The Task Force chose two specific objectives on which to concentrate: 1) updating and skills for ourselves; 2) directions for CLENE.

---

1 As of July, 1976, member states are: Arkansas, Florida, Idaho, Illinois, Maryland, New Hampshire, New York, North Carolina, Ohio, Oregon, Pennsylvania, Vermont, Virginia, Washington, and Wisconsin.

Constituency of the second Assembly

The one hundred and twenty-eight participants, from 38 states, came together to the second Assembly as a working group under the auspices of CLENE, but they represented many other groups. By type of organization, the four largest groups were: Library education programs (33); Academic libraries (21); State library agencies (21); Public or other libraries (20). By type of position in organization, the four largest categories were: Directors (43); Professors (20); Consultants (12); Assistant Directors (12).

The Purpose of the CLENE Assemblies

The CLENE Assemblies serve a number of important purposes. They serve as a forum to identify current problems and issues in library, information, and media continuing education -- issues to which CLENE should give particular attention and take action, and issues of concern for the whole profession. They serve as an up-to-date learning resource for all those involved in continuing education. Through the Continuing Education Fair, they serve as a centralized medium for demonstration of projects and activities. They serve the very vital function of making it possible for members of many different groups concerned with continuing education to meet, dialogue with each other, and learn of current developments.

Of particular importance, the Assemblies have the ingredients of a force that not only can discuss, but can adopt feasible recommendations. These can be forwarded to the Board of Directors of CLENE for implementation and can be brought to the attention of the whole profession for consideration and action.

4 Elizabeth W. Stone
Executive Director

TABLE OF CONTENTS

FOREWARD ---------- i

INTRODUCTION ---------- v

ASSEMBLY II

OPENING SESSION, July 16, 1976

President's Report - Nettie Taylor ---------- 1

Report of the Panel of Review and Evaluation ---------- 10

Treasurer's Report ---------- 13

Small Group Discussion Questions ---------- 16

PROGRAM SESSIONS ---------- 31

The Knowledge Broker - Alan Knox ---------- 32

Staff Training and Development in Industry - James Sucy ---------- 57

SECOND SESSION, July 17, 1976 ---------- 104

SMALL GROUP DISCUSSIONS

Group 1 - Principles of Adult Education that Should Be Adhered to in Continuing Education Programming - 105

Group 2 - Needs Assessment Techniques Used for a Continuing Education Program in Staff Development --------- 112

Group 3 - Designing Evaluation Plans for Training: A Practical Approach ---------- 114

Group 5 - A Model Program of Continuing Education and Staff Development for Academic Librarians ------ 117

Group 6 - Non-Traditional Educational Techniques --------- 121

Group 7 - Development of Instructional Modules, Self-Contained Learning Packages ---------- 124

TABLE OF CONTENTS - continued

Group 10 - How to Plan and Conduct Continuing Education Workshops and Institutes ---------- 137

Group 11 - Initiating a Statewide Program for Continuing Education ---------- 141

Group 12 - The Knowledge Broker ---------- 165

CLOSING

Address by 1975-76 President - Nettie Taylor ---------- 169

Address of Incoming President - Ruth Patrick ---------- 170

APPENDICES

A - Participants in CLENE Assembly II

B - CLENE Fact Sheet

INTRODUCTION

With this second Assembly, the "ad-hoc" CLENE organization which had explored the question, "Do we need an organization?" now began to search for answers to questions like, "What shall our organization do to serve the continuing educators in the field? What are the essential skills required for our task? Are the programs and projects CLENE has begun really doing the job?"

CLENE has a continuing concern for direct contact with the individual member who is engaged in planning, conducting, and evaluating continuing education events. The first session of this second Assembly consists of a report to the membership by President Nettie Taylor on CLENE activities and services over the past six months, together with a report of the concerns, questions, and suggestions of the membership.

The major program segments concern how those of us who are engaged in continuing education shall define our role, and how we go about the business of defining continuing education needs and developing appropriate ways to meet those needs. Dr. Alan Knox of the University of Illinois, a long-time participant and analyst of continuing professional education, proposes the concept of "knowledge broker" as an appropriate model for those engaged in developing continuing education services to the library and information science profession. His analysis of the component dimensions of this role will prove helpful to anyone engaged in a self-critical assessment of what he or she is doing in continuing education.

Jim Sucy, manager of Education Market Services of Kodak ("a small photographic company in Rochester, N.Y."), presents an analysis of the

essential steps in developing continuing education programs and products to meet definite training needs. He helpfully distinguishes between those needs which can be met by training and those needs which require management or organizational change.

The long, carefully thought out process which occurs prior to a specific program format or educational product is called "Performance Analysis and Instructional Design". Mr. Sucy stresses that we analyze what the individual needs to know and what skills he must acquire to perform on the job, before we plan specific programs, speakers, tape shows, or products. A careful study of this industry-based process apllied to at least one educator's planning process has convinced him that his own educational planning often started without asking the essential questions, and often resulted in educational events which, while exciting, did not meet the real needs of the individuals who came to the events.

In keeping with the second Assembly theme, "Updating and Skills for Ourselves: Directions for CLENE", the small workshop reports in these proceedings cover specific concerns related to the workings of the continuing education broker at several levels:

Principles Of Adult Education That Should Be Adhered To In Continuing Education Programming

Needs Assessment Techniques Used For A Continuing Education Program In Staff Development

A Model Program Of Continuing Education And Staff Development For Academic Librarians

Non-Traditional Educational Techniques

Development of Instructional Modules: Self-Contained Learning Packages

How To Plan And Conduct Continuing Education Workshops And Institutes

Initiating A Statewide Program For Continuing Education

The Knowledge Broker

Clearly, CLENE is beginning to ask hard questions: "What is outstanding professional performance and how do we train people for that? How are our needs assessment tools working? What kinds of coordination, duplication, and resource sharing can we do? How do we train our knowledge brokers in evaluation techniques? How is recognition related to evaluation?" Hopefully future CLENE Assemblies will continue this type of searching analysis.

Kieth Wright, Editor

PROCEEDINGS

of the

Second CLENE Assembly, July 16-17, 1976

Opening Session at the Palmer House, Chicago

Nettie Taylor: It is my pleasure to welcome you to the Second CLENE Assembly and to review with you the agenda for this meeting which you have in your program. I want to report to you on the status of CLENE, and as a part of that report, the Treasurer's report and a report of the Panel of Review and Evaluation. These are all going to be relatively brief. We want to have opportunities to provide for questions, comment, input from you, so at the end of these reports we will be having you assemble again at the small tables for the questions and the discussion that you would like to bring up. I hope that we can allow plenty of time for discussion of these reports before we break up. We will then be announcing the results of the election and introducing the new officers, and Ruth Patrick will be explaining the Assembly program meeting. As you may have realized when you read the constitution and by-laws, it is the duty of the President to report to you on the status of CLENE. That is what I am attempting to do now very briefly.

First, as you know, this has been a year to bring into being the structure and organization of CLENE, making it an official national organization with a constutution, by-laws, and dues structure. These have been accomplished and I won't review the details of this unless you want to bring this up in the question period. CLENE is now incorporated as a non-profit agency. Just last night when the Ad Hoc Board had its last meeting as an ad hoc board, we all had to sign a paper that the lawyer

said was required so that our "ad hocness" goes out of existence and we passed on CLENE to the duly elected officers of this association.

The second priority for this year, as for any new organization, or for any organization for that matter, has been to recruit new members. This has been done in a variety of ways, through organized media, through letters, through publications, through a number of people being speakers at conferences and before other groups, through the work of individual Board and Advisory Committee members, and other members here who are interested in the purposes of CLENE and would like to see it become a very live and viable organization. As a result of about eight months of recruiting activity, CLENE now has 450 individual members, 18 institutional members, 15 association members, and 15 state library agencies. Of course, as you realize, this recruitment and membership drive will certainly continue.

A third major activity was to begin to provide services related to CLENE's purposes and objectives that had been expressed to us as being of the greatest interest to members. I want to highlight some of those briefly:

1) Up-to-date information on continuing education opportunities and programs. This has been done through the establishment of a computerized data base of continuing education programs, and operates out of Betty Stone's office at The Catholic University of America, through a published directory of continuing education opportunities, programs, and courses that is in the back of the room, through the membership directory of CLENE members which we decided really is a misnomer. I guess we've decided it really should be called a Who's Who in Continuing Education, because that directory includes

information on special interests, special skills and experiences in the field of education of the members of this association. This Directory just came off the presses today or the day before. There are copies here for sale and Leon will be saying more to you about this. It is a resource for continuing education planners in locating other continuing education personnel resources that might be available to you. So it's much more than just a listing of the members of this association.

2) The CLENE Assembly Program. These Assembly programs — we've had one, we're now coming into the second one -- the first one in January was on the assessment of continuing education -- the Proceedings of that First Assembly are now printed. They have been distributed to the participants of that First Assembly and additional copies are available to other members for a fee. The Second Assembly is the one we will be having in the next two days on "Needs Assessment — Individual and Group." The Continuing Education Fair, which we held at the First Assembly, aroused a great deal of interest I believe, from the people that were there, and this will be continued at the program today and tomorrow. The purposes of these Assemblies are to provide a forum to identify and discuss unmet needs and problems and issues, to learn more and update our learning on continuing education resources,

continuing education trends, things that are going on in the field -- it's also an opportunity for many different kinds of people from many different kinds of groups to meet and discuss and to learn from each other. The Assemblies have focused on the topics that members have indicated are of major interest to them. Ruth Patrick will be explaining this to us further when she talks to you about the program that will follow this meeting.

3) The CLENExchange, which is another important avenue of providing communication among members, to members on CLENE activities. Also it serves other purposes. I've been impressed myself with the analysis of outstanding publications in the field of continuing education and the brief descriptions of some of the programs and activities of other associations and agencies.

The CLENExchange was issued four times this year and it is the plan to continue to issue it on that basis. We expect that in the future it will provide also a medium of direct exchange of ideas and comments from the individual members, so that we can then use this publication as a way to get direct input from individual members about any of the continuing education ideas or concerns that they may have.

4) Other publications this year that are available from

CLENE provide direct assistance to contuing education planners -- Concept Paper #2, A Guide for Planning and Teaching Continuing Education Courses, Concept Paper #3, Planning and Evaluating Library Training Programs, and Concept Paper #1 is still being developed. It's in the process, but it's called Developing Continuing Education Instructional Materials, and this is being done by Brooke Sheldon and Blanche Woolls. These do not exhaust certainly the list of numerous items of correspondence, news releases, answering individual letters and questions, that come directly to the CLENE office.

A great deal of time was also spent this year in the preparation of the proposals which were submitted to the U.S. Office of Education for funding next year. These two proposals do address, I think, some of the major concerns that have been expressed by the members and were discussed to some extent at the CLENE Assembly in January.

The first project is the one to train continuing education staff people in 25 state library agencies. This will be a five-day institute that will be held in November at the Illinois State Library in Springfield. This institute contains within it at least two components, as I said, that have been identified as being of major interest to CLENE members. One of them is the design of a needs assessment model to assist continuing education planners. The other is to develop some criteria for evaluation of continuing education programs. Both of these will be dealt with within that institute, and it is our expectation that out of that will come some publications that will be of interest to the whole CLENE association.

The second project is a feasibility study of a recognition system for library and information science personnel, including non-traditional formats. Included also in this project is the development of a prototype for home study programs, including guidelines and criteria.

A summary of these two proposals was in the CLENExchange.

Another thing, of course, that has been of overriding concern is money, and I am going to call on Leon in a few minutes to talk about funding, as he is the Treasurer of the association.

The CLENE Board at its last two meetings has worked on and developed a planning document for the new Board. This document tries to outline for the new Board where we are, all the things that have been carried on this year, the kinds of things that we believe should be addressed by the new Board. I think that it's very difficult, it's been very difficult for this Board to come to grips with the priority items that we should be addressing within the limitations of staff, staff time, money, and it's our hope that now that we have a good membership base that much of this input will be from the members. Some of the work will be from the committee.

One of our major concerns, really, has been to involve the membership much more actively. I think you have to realize, you know, that when we started a year ago, there really wasn't a membership, and the Ad Hoc Board and the Advisory Committee did take on, I think, many decisions, many kinds of responsibilities within those two elements that really ought to be membership kinds of activities. Now that we have a membership, I think it is an overriding concern of the new Board that the membership gets put to work and gets actively involved. We are concerned that some of the things that we are doing may need to be evaluated; many of you have not been too happy, I suppose, with the dues structure, and the new Board I expect will want to look at this. On the other hand, we don't have a lot

of money, as Leon will tell you, and the funds we anticipate having for this next year will probably allow us only to carry on the things that we are already doing, unless some of these things get shoved aside for things that the membership feels are more important. The Board is going to meet to address itself to some housekeeping and procedural matters which this Board has really not had time to do, and that is to develop guidelines and policies on a number of things, one of them certainly being publications, who gets them, at what prices, to what extent can CLENE absorb a loss on publications if they are not all sold -- there are a number of questions, program questions that need to be addressed, as well as financial questions. As I indicated, we did officially sign papers that turned over the responsibilities of this Ad Hoc Board to the new Board.

We are concerned about ways to make CLENE more understandable, more meaningful to the members. I already had this in my notes of what I was going to say to you and those of you who were here for the earlier orientation meeting realize that we are aware of this and you are aware too that there are some problems in this area; it is one of the problems that came up. So we are really talking about how we can provide the most benefits with the limited resources we have and I think that's where we need all the help we can get from you as members in helping to solve these problems. Most of us, or maybe all of us, joined CLENE because of our interest in continuing education, and our belief that a national organization, devoted to the development of continuing education, could improve the profession, and could improve our own capacity as individual members in carrying out our responsibilities. And I think we're all working toward having these hopes realized. As our friend Peanuts said, "There is no greater burden than a great potential." I think that's what we have. At

least I feel we have.

I want to say before I close this first report to you that we are continually indebted to Betty Stone and her very small staff of Mary Baxter and one secretary for long and dedicated hours and dedicated service to this idea. And I would like at this time to ask Julia Virgo, our secretary, to read to you a resolution of the Ad Hoc Board of Directors. Julie.

Julie Virgo:

WHEREAS Dr. Elizabeth Stone has served as Executive Director of the Continuing Library Education Network and Exchange during its first year with unstinting diligence without financial compensation, and

WHEREAS her effective leadership in inaugurating and developing the structure and services of CLENE has resulted in a viable national continuing education organization, and

WHEREAS Elizabeth Stone continues to serve with distinction in carrying out and furthering the programs and purposes of CLENE for the benefit of the library and information science profession and its members,

NOW THEREFORE BE IT RESOLVED by the Ad Hoc Board of Directors of CLENE that deep appreciation and commendation be extended to Elizabeth Stone for her accomplishments and her continuing contributions to this effort, and

BE IT FURTHER RESOLVED that this resolution become a part of the official records of CLENE and that a copy be transmitted to Elizabeth Stone.

By the Ad Hoc Board of Directors, July 16, 1976, and signed by Nettie B. Taylor, President, and Julie Virgo, Secretary.

(Motion from the floor to have resolution entered in the minutes.)

Nettie Taylor: I want to say one last personal word of my own in thanks and appreciation to this Board. I think we've had a very difficult year -- we've had a very exciting year, and certainly we've had a Board whose members have really been dedicated to trying to tackle the problems of bringing this new organization into being. Let me introduce the members of the Ad Hoc Board: Maryann Duggan, Dorothy Deininger, Pauline Vaillancourt, Dick Wilt, Margaret Myers, Al Trezza, Bessie Moore, Leon Montgomery, Julie Virgo, Howard Hitchens. Thank all of you, many thanks.

One of the things the Board did this year which was allowed in the by-laws was to appoint a Panel of Review and Evaluation, to look at the work that had been carried on this first year and to report back to the Board on this. That committee was made up of Ken Vance, Kay Gesterfield, and Dr. Joanne Harrar. Dr. Vance is from the University of Michigan, Kay Gesterfield is Illinois State Librarian, and Dr. Harrar is Director of Libraries at the University of Maryland. Kay Gesterfield will present the report of the Panel of Review and Evaluation.

REPORT

of the

PANEL OF REVIEW AND EVALUATION

Kay Gesterfield: Neither Ken nor Joanne could be here and Ken called me the other day to ask if I would do this for the panel.

It was very gratifying to work at Catholic University with Betty Stone and the staff at CLENE. We had all sorts of cooperation. They furnished us with great documents and at the end of the week we were able to furnish a nine page report. The typing took a little longer, but we had the thoughts down.

We evaluated CLENE's first year in terms of the objectives as set forth in the proposal which funded the first year of planning and organization, that is to say:

> Creation of a permanent administrative structure for CLENE, Board of Directors, Advisory Committee and Assembly;
>
> Secondly, establishment of an acceptable financial structure in terms of membership, institutional and personal membership fees and a basis of fees assessments;
>
> Third, development of operational mechanisms for the four processes of CLENE: continuous needs assessment, information acquisition and exchange, program and resource development, and communications and delivery to increase the awareness level for continuing education in the field of library and information science, and

Finally, the identification of sources of funding and the preparation of proposals.

Our document treats each one of these objectives individually, and I would be happy to answer any questions about them. However, the conclusion is that the Review Panel agrees that the project has indeed been successful in its efforts to achieve the initial objectives established for CLENE. Further, the Panel wishes to encourage the first formal Board of Directors to continue striving toward the fulfillment of the CLENE mission so effectively begun by the Ad Hoc Board and the CLENE staff.

We did have a series of recommendations and since this report has been submitted the Ad Hoc Board has met and has comments on our recommendations, which I will try to incorporate into the recommendations as I go along.

The first one was that the vacant position of Research Assistant should be filled immediately by a qualified individual, who should devote at least half time to this important responsibility. I believe the day that we were there was the last day the Research Assistant was on duty. The Board responded to this recommendation by pointing out that that position was funded by the 1975/1976 USOE project and is not in the current one, therefore it is not really a vacant position. However, the Board agrees with us that the recommendation that this position be funded as soon as possible is a good one. There is at the present time, as I understand it, no source of funding for this, but apparently it is something that the Board is considering.

We made a mistake on the second one. We recommended a full time secretary, and they already have one. We had a little trouble with the by-laws and recommended a review of the by-laws with reference to Article VI,

Advisory Committee, and Article VII, Sections 3,4, 5, and 6, Board of Directors, because of the use of the word "class," which does not seem to be quite consistent throughout the by-laws. At least in those Articles it does not seem to correspond with the use of the term "class" in Article IV, Membership, and it is not defined in Article VI. A little picky, picky, but we had a little difficulty with that one.

The Panel advises the new Board to review the financial support structure of the organization with the realization that foundation or special grant support will continue to be vital to CLENE's future.

In addition, more effort should be made to inspire membership from state agencies.

The Panel recommended a yearly audit of the financial records of the organization by a certified public accountant. The Board points out that this may not be necessary, since CLENE is included in the audit of Catholic University, and the Board agreed to obtain copies of the portion of the audit that relates to CLENE for its records.

Recommendation No. 6: The concept of needs assessment in publications emanating from CLENE should be continually stressed.

Recommendation No. 7: The Panel recommends the development of specific tools to be used in the evaluation of such activities or services as the "Idea Forum," the Membership Directory, the Directory of Continuing Educational Opportunities, and the data base.

Recommendation No. 8: CLENE should take more initiative in its role among library-related organizations to assume sole responsibility for the publication of continuing educational opportunities. This is another recommendation that the Board reacted to. It said that CLENE expects to assume an increased leadership role in this area. However, the Board feels that it is not appropriate for any one organization to assume sole responsibility

in this activity.

We were of course concerned about the duplication of effort and the publication of some educational opportunities in many places.

Recommendation No. 9: The Panel suggests that the organization avoid unnecessary duplication of information. It may be feasible to direct distinct publicity toward special groups, outlining the importance of CLENE for each group, rather than having only one general brochure for all possible constituents.

And finally, the Panel recommends that the organization re-examine its use of the terms "goals," "objectives," "missions," "programs" and "processes" in order to assure that each is distinctly and non-duplicatively used, and used in that way on all future planning and publications.

As I said, it was a very interesting and pleasant experience to work with the staff of CLENE. We enjoyed the opportunity and we were very pleased to see how very well CLENE had accomplished its objectives in this first year.

Nettie Taylor: Thank you, Kay.

I think the present Board, the new Board, is very appreciative of the work that these three people did in kind of taking an outside look at what has been going on, and I think that the points she made were certainly well taken. I'm not sure that Kay read to you the full minutes of the Board in which they did adopt the rest of the report and express their appreciation to this Committee for doing this job for us. You may want to think about what she has said and use any part of this in your discussions at the tables in a few minutes.

I'd like now to call on Leon for the Treasurer's report.

K. Leon Montgomery: During this year the income has been $61,000. The four major sources of these funds are some government grants--grants from the U. S. Office of Education amounting to $28,000, which permitted the liftoff of the organization, administrative structures and so forth. From the states -- 15 states that joined this year have provided a total of $16,000, roughly $17,000 -- $16,900+. They are all included in that figure, though. From dues and memberships, and income derived from the last Assembly meeting, there was $15,5000 -- again these are rough. I have the precise details in case anyone's interested. And from the sales of publications to date roughly $1,000. The expenditures for the year were $47,000+. Major cost centers in these expenditures were of course personnel at $25,000, the creation of the computer data base, the publication -- the creation and the publication of the various directories that have already been referred to, the Continuing Education Directory, the Membership Directory, or Who's Who in Continuing Library Education, and the concept papers, and so on. Again, cost breakdowns are available there. If you noted that we took in $61,000 and spent only $47,000, this leaves us a balance from the first year of approximately $14,000. The general notion is that the Board has been reasonably conservative in trying to assure that CLENE exists in the next several years, of course, and perhaps forever. But the idea is that we wanted to be sure that there were sufficient funds to operate the second year because the $28,000 grant was a one-time grant just to get started.

So a tentative budget has been set up for the next year of approximately $39,000. Now this budget is reasonably austere in the sense that it does not, as Nettie has already suggested, allow much room for major new activities. It also depends on the continued unstinted time and effort of Betty Stone without financial compensation and also leaves open a Research Assistant position. However, we believe that all programs, at least as now

going -- all ongoing programs -- we have sufficient resources to keep those going. Yes, and obviously you are all encouraged to continue your memberships.

Now the notion that was brought up previously, that Joe Shubert suggested, that we might make some effort to be sure that the state library agencies and the state library associations and others are getting -- see some return for their money, I think Nettie referred briefly to me in that context. I recommended to the Board last night that in fact we be sure that some of our products are sent to each of these agencies as advertisement, if nothing else. The notion being that we did not have time, in the way things developed, to have an extensive ad campaign alerting and making people aware of all the publications and that the new Board consider sending some of these in the sense of promotional materials to state library agencies and to state library associations, and to others who may be interested in CLENE.

I also wanted to tell you, make a couple of comments about some decisions made last night by the Board vis a vis the Directory of Continuing Library Education Courses. This Directory, as a special promotion during this Assembly meeting, will be on sale for $5.00. Also the Membership Directory, which is brand new and will be on sale as of Monday morning at a price of $12.50, will be on sale for $10.00 during this Assembly. This is a brand new publication. If you choose to buy both, the price will be $12.50. That's just a special. We're going to try to have a series of special promotions for those who come and register at each of the Assembly meetings.

Are there any questions from the floor? Obviously we have a number of potential questions. And I should also call to your attention that when we break up in small groups there will also be an opportunity there for you to explore further if you like.

(Question from the floor, inaudible)

The Directory was originally priced at $15.00 and will be again, but right now it is $5.00 for those who are in attendance here.

Nettie Taylor: We talked yesterday with the Task Force that set up the program for this meeting. You will have an opportunity tomorrow when you fill out your evaluation of this program to give the new Board and the new task force for planning the next Assembly your view on whether the Assembly should be connected with the ALA conference, or how often you want an Assembly, where you think it should be held -- there will be several questions that will be on that evaluation sheet tomorrow. They would very much like your input on that, and they asked me to remind you, to tell you now that this item would be on there, so that you might give it some thought and give us your ideas on this before you leave tomorrow.

You now have a chance to break into your small discussion groups and bring up any questions, any comments that you would like to. I think you should have about 30 minutes for those groups. Members of the Board and Advisory Committee will be your hosts/hostesses at these groups.

I think I should say at the outset that if there are easy questions I'll try to answer them. If they're difficult ones they'll either get thrown back to the Board or to you, the members. Betty Stone, Ruth Patrick, and Margaret Myers who gave you the background information at the orientation meeting may be able to help answer some of the questions. I would ask when you respond from the audience, it would be useful if you would use the microphone, because these proceedings are being recorded and we may lose a good deal of the discussion if it can't be picked up.

Let's start with this table over here, and just move down and around. Is there a question from Table No. 4?

Question: What about cooperation at the state level for continuing education -- is CLENE promoting that? Will there be state chapters of CLENE?

Nettie Taylor: Let me answer part of that, or try to explain part of that. I think that is indeed true, and one of the things that the planning document that the old Board has put together for the new Board is that the kind of organization or state plan, or organizational kind of framework within the state that brings together the state agencies, state library associations, library schools, other kinds of library associations and groups within the state, so that this kind of a program is coordinated within a state, is very much needed. One of the objectives of CLENE is to further that kind of working together at the local level and within the state. I think that we very well recognize that this is something that CLENE has not been able to address very sucessfully during its first year, and you are right that it is one of the things that will be a major piece of the discussion and of the planning of ways to bring this about that will take place in that institute. I don't think we've gotten so far as to talk about chapters. There was a very strong feeling that we ought to try to get this together in some kind of format. We are talking, and you will be hearing from Dr. Knox, if I'm not mistaken, about this whole concept of linkage agents -- of how this might operate to get this kind of input to the association and to generate this kind of activity cooperatively at the local level, state level, regional level.

Ruth Patrick: If I might comment on that. There has been talk about that, and we've been a little less ambitious, but we have been thinking about having an information network and identifying a liaison person in each state, who could begin to accept responsibility for at least disseminating information about CLENE and trying to gather information that they would then hand back to us. There is going to be a task force formed that will be Membership and Public Relations, and as part of its charge, we are going to consider this function. But the idea of the state chapters -- that's the first time I've heard it mentioned, and I think we definitely will explore this further.

Nettie Taylor: Table No. 12?

Question: I'm Joan Durrance from the University of Toledo. We had a number of concerns that we have heard already and I was very pleased that you had mentioned those. We would like to see CLENE encourage the recognition and rewards system in continuing education. That would include setting guidelines and yardsticks for continuing education and assuring that participants in continuing education be encouraged to take the lead. This led into the statement that CLENE serve as a lobbying agency with managers, for many librarians who are working in situations where they're in special libraries, and they're working with people who are managers. CLENE needs to work with these, with the management group. CLENE also needs to work with other library associations and with library schools, and encourage cooperation and a liaison with these outside groups so that we not only talk to each other but we talk to those who are not directly involved in continuing education.

It was suggested that CLENE should provide well structured modules or packages, that that should be done with relative priority. That would include assessing the needs and then developing the packages.

Nettie Taylor: Thank you. I think Betty is either going to respond to this at the moment or when you talk about this as part of new business. Which would you prefer to do?

Betty Stone: As long as it's been brought up now, we would particularly like to respond to your stating that there is a need for us to do something about recognition systems. I am very glad to hear this idea because it is one of the proposals that we turned in to the U.S. Office of Education, and this is one of the proposals that was funded. I would like at this point to introduce you to some of the people who are working on that, and to emphasize the fact that at the CLENE Fair tonight these people will be there to get you ideas as they start collecting a consensus of how you feel about what should be included in a recognition system. The name of the program is "The Development of a Model Recognition System to Serve the Profession of Library, Media, and Information Science, which will include Non-Traditional Formats, Especially Home-Study," and in this area we are developing a prototype. The principal investigator for this project on the development of recognition systems is Dorothy Deininger. Dorothy has been Director of Continuing Education and Professor of Continuing Education at Rutgers University. We are very fortunate to get someone who has had an outstanding career in this area -- continuing education -- to head up this project, and she will be on the staff of CLENE, carrying out this project, throughout next year. Assisting her as full-time Research Associate is Eileen Sheahan, who has been most recently on the staff of Yale University Library, and who has had considerable experience in the area of continuing education.

Tonight at the Fair, these two members of the Recognition System Project Team will be at one of the tables -- they encourage you to come by

and tell them your ideas about what should be included. They will have some lead questions for you.

Another key person in this whole project is the person who is developing the prototype model, and we chose it because we found out from earlier surveys that this is a prime need, and that is "The Impact of Automation and the New Technology on Libraries and Information Centers." The person who will be developing this package is Dr. Leon Montgomery, of the University of Pittsburgh. We also have a distinguished advisory board who will be working on the project; they will be meeting this week also.

Nettie Taylor: Who's next?

Question: I'm Helen Miller, Idaho. At our table we discussed some need to make a simpler questionnaire, in order to get better response from the people who are providing continuing education events and could provide input into the directory. We suggested the idea of some coordination with such simple listings of CE events as are put out by Illinois and Kentucky presently, that perhaps some simple listing that is more current would be useful nationwide and then the things that are published by CLENE could be for retrospective use with more detail. Also, we aren't sure how the data in the computer is being used. We hope if it's being used that way, that it would be possible to make it somewhat like Medline so that a call could be made to CLENE asking for a bibliography of the events that are in the computer on a certain subject, and that could be mailed out.

Betty Stone: If I could respond to this. I know all of you like to have simple things, but in all of these projects we take a research approach.

The reason that there was a longer questionnaire was based from other professions which found that if you are not going to operate like an accreditation body, which we are not, for continuing education opportunities, there should be enough information so that individuals will know before they attend whether a given opportunity meets their needs, whether it is at their level, what are the behavioral objectives, what they will learn as a result of the program. Also, it is important to have enough information so that planners - manpower planners as well as planners of continuing education courses -- can know what's being covered. If you just have a brief listing, it doesn't, you know, serve quite the same purpose or meet as many needs.

Perhaps a brief listing might come out in the CLENExchange, but the committee that worked on that saw the need for this detail because it does add some kind of a measure of quality presented there for the people to see before they partake or for planners to know. But we appreciate your suggesting this, and we'll look at it again. Maybe there is a half-way, medium, in between the two.

So far as phoning the data base and getting those lists goes, you can do that now. The Directory itself, in the introduction, tells you all the ways you can ask for information. And you can get that now.

Nettie Taylor: Next?

Question: I'm Paul Little, from Oklahoma. We have an observation we'd like to make at our table. We have expressed there a concern for the finances as well as the growth and a broad base of membership for the organization. Viewing some trends that we've heard and noted today, we'd like to encourage

CLENE to work toward promoting individual membership, as perhaps the most immediately available broad base of growth as well as finances. And we have a question.

If the state association is a member, is it possible for an individual member of the state association to purchase CLENE documents at a discount through the state association?

Nettie Taylor: I think it's clear enough that if the state association itself does the purchasing they get the discount, and what they do then in supplying those to the members I think would be up to that state association. I don't think we are prepared to provide the same discount to the individual members coming directly to CLENE. But if the state association wanted to combine these orders and send them in under the aegis of the member association, the structure is set up now to handle it that way. We'll let the Board wrestle with the individual discount problem.

Next table.

Question: Hi, I'm Ray Vondran. Our table has three items we would like to bring up. Two concerning recruitment and one concerning publications. Since students in the Library Science Master's program are undergoing the first steps in socialization within the library profession, and since their attitudes are being formed toward continuing education at that point, we were wondering what measures could be taken to aggressively recruit the Master's students, library science students, both winning them, co-opting them into continuing education, and also in bringing them into the membership of CLENE. We had two particular suggestions. One was that local members

might wish to give colloquia at library schools, and the second would be an inducement to students through lowering the fees. Something like a nominal fee, a $5.00 membership, that would be offered to Master's students.

Nettie Taylor: A good idea.

Ray Vondran: The second point about recruitment was that local members would actively and aggressively contact state library agencies to supplement whatever mailings they would be getting from CLENE. A more personal approach.

Lastly, with regard to publications. With regard to the publication of the document on continuing education programs. One suggestion was made that perhaps one could look into the feasibility of reproducing a document via computer output microfiche, reducing the cost, and then having individual libraries and agencies reproducing only a portion of the document in hard copy. Those are the three items we have.

Nettie Taylor: Thank you very much. I think those are good suggestions. There has been some discussion about the microfiche approach and it was discussed last night.

Are there any other tables we have not heard from?

Question: You were mentioning linkages. I'm lucky enough to be in a state association that seems to be undergoing change, and could CLENE become a lobbying agency to press the state agencies to form roundtables for continuing education? Would you have a data base or a list of those state associations that do have such roundtables?

Margaret Myers: Although earlier in the year I did send a letter to all the state association asking if they had continuing education committees, and I did get responses from about 20, I believe. I did give that list to Betty Stone. Some of the state associations have library education committees or groups, which are more concerned with basic education, but there is a move in some state associations to broaden this to include continuing education, so I think in contacting state associations this is certainly a good basis on which to work.

Question: In that news release that you were discussing, I would suggest, my own personal opinion, that you do press for that, because that would be a good linkage agent, something that would exist which would work both ways.

Nettie Taylor: Are there other comments?

I hope that you think this has been a very useful way to bring the whole membership to the CLENE Board. I'm sure I speak, as the Past President, for the new Board and the staff that all of these ideas will certainly get into the mill. To the extent that we can, we will certainly try to address them to the satisfaction of the members.

I'm now going to turn the mike over to Betty, who will introduce to you the new officers of the association.

Betty Stone: I noticed that Maryann Duggan asked for a point of personal privilege , and I would like before I undertake my assignment for a point of personal privilege. First of all, I want to say that I was very touched by the recognition but obviously in this association, as in others, it really depends on the work of so many people. Nettie had the Board introduced,

but I would like to pay a personal tribute to a couple of people whom I would like to single out who have been particularly supportive in addition to the Board. First of all, there is Nettie herself, our first President. I don't think any of you have any idea how much time and effort she has devoted to this, and never have Mary Baxter or I phoned her that she hasn't given willingly of her time. Then I would like to turn to the Commission. You did have Bessie Moore introduced, and you did have Al Trezza up here on the platform, but I want to say that it's been a great inspiration to all of us to know that a body which is as important and has as much influence in our profession as the National Commission has indeed been behind us. The support that both Al and Bessie have given is wonderful. For example, you may not know, but Bessie just suffered from being in the hospital, and one doctor told her she shouldn't come here, but she was determined to come an she is here today. These are great motivating factors which you may not have realized unless you've worked with these people.

I would like to go into National Commission history just a bit before the active participation of Bessie and Al to somebody I see sitting in the back of the room, that is Rod Swartz. He is now State Librarian for the sovereign state of Washington, but many of you may not realize that when he was the Deputy Executive Director of the National Commission, it was he who kept emphasizing to the Commission that the development of human resources through the medium of continuing education was important. I think we owe him a particular vote of thanks.

There is someone else I wish I could ask to stand up who has exerted a major influence in CLENE since the first. Some of us who are in the Association of American Library Schools may remember that we started out with this idea of having a continuing education network quite some years ago, and some of the people in this room were active in this. Along with

the National Commission this was certainly one of the major factors that helped CLENE get on the road, and the leader both in the Association of American Library Schools, because she did teach part-time at the University of Oklahoma, and in all the meetings and the activities of the Association, was Allie Beth Martin. I think we owe her a particular tribute. We tried to say something about this in the CLENExchange, and although there we didn't have room to express all of our ideas, some of her key thoughts about the importance of continuing education for everyone are expressed there. If you didn't happen to read this I hope you will, because I think it reminds us of the fact that a really great leader of our day thought continuing education was very important; and this is a clue for us also.

Then also there are a few more people I wish to acknowledge before I introduce the new officers. One group is the Ad Hoc Advisory Board. You had a very dedicated Advisory Board as well as a Board of Directors, and the President, Ruth Patrick, spent a great deal of time. She also came to the Board meetings. There were a number of people on the Advisory Committee who went far above the call of duty. Whenever we sent out papers they always reacted. Two such people who always reacted and spent a particularly large amount of time on that Advisory Committee are here today -- one is Barbara Conroy, who I don't think we ever sent anything that she didn't react to, and we appreciate that; another is Joe Shubert. Joe is now a member of the Board.

Then there is somebody else that I'm afraid most of you don't recognize at all who has given many hours to this cause, and I'm sure she's been pleased to hear the praise that's been given to the CLENExchange, because as a volunteer service, Mary Feldman has been serving as our volunteer editor

for the CLENExchange, and so Mary, we thank you for the many hours you have spent on this project.

Now on to the newly elected 21-member Advisory Committee. There is something I would like to point out to you about the Advisory Committee. That is that Barbara and others have always been telling us how important the grass roots are, and I think this is very important. The new Advisory Committee has only three people who have been officials of CLENE before. It is really exciting that we have all these new people involved. I will read their names, and ask them to stand. We have 15 states represented on this Advisory Committee. Dr. Henry Alsmeyer, Texas A & M University; Susan Bullock, Cheshire Public Library, Connecticut; Ching-Chih Chen, Simmons College, Boston, Massachusetts; Joanne Crispen Park Ridge, Illinois; Jewel Drickamer, Rhode Island Dept. of State Library Services; Paul Little, Oklahoma County Library System; Sister Therese Remy, Emmanuel College, Boston; Dr. Frank Birmingham, Mankato State University; Margaret Grazier, Wayne State University; Nancy Greer, Denver Public Library; Charlotte Kenton, National Library of Medicine; Sheldon Lawarence, Arizona State Library; Mary McKenzie, New England Library Board; Betty M. Nichols, Kansas City Public Library; Barbara Conroy, Tabernash, Colorado; Marilyn Gell, Washington, D.C.; Harold Goldstein, Florida State University; Cosette Kies, George Peabody College; Peggy O'Donnell, Southwestern Library Association; Joyce Veenstra Columbia University, and Barbara Weaver, Central Massachusetts Library System.

The Board of Directors has 15 people. There are 14 different states represented, Ruth Patrick is the new President of CLENE, and the Vice President/President Elect is Maryann Duggan. Elizabeth Lindsey is the Secretary and Leon Montgomery the Treasurer.

The other members of the Board of Directors are Joe Shubert of the Ohio State Library; Rod Swartz of Washington State Library; Margaret Myers, of the ALA offices; Jane Younger of the Wisconsin State Library Division; Duane Webster of the Association of Research Libraries; Dr. William Summers, Dean of the South Carolina University Library School; Helen Miller, of the Idaho State Library; Julie Virgo, Medical Library Association, in Chicago; Virginia Lacy Jones, Dean of the School of Library Science, Atlanta University, who was unable to be here today, and Jim Nelson who is Director of Continuing Education at the University of Kentucky.

The Nominating Committee members were: Lyle Eberhart, Wisconsin State Library Chairman; Harold Malinowsky of Kansas, and Elizabeth Pan of Washington, D.C.; Susan Schmidt of Kentucky and Dr. Robert Stueart of Simmons College.

We also had an Election Committee (it was decided to extend the time in which the ballots would be received because the mails really slowed our election system and for this we apologize) consisting of Carol Alexander of the Federal Library Committee, Sandy Beeson of Northern Virginia Community College, and Christina Carr Young, who came in on July 1 to count the ballots officially. We immediately got out the results.

Before I sit down I want to make a final introduction. Eileen Sheahan, will be a Research Associate on the recognition system project. Both she and Dorothy Deininger will be at one of the CE Fair tables tonight to get your reactions about a recognition system.

Bessie Moore: I couldn't resist this, the opportunity to do this, because I think all of you who have been working in the area of libraries

or education or any public endeavor know that an idea has to have an advocate--sometimes it's more than one, but there certainly can be one and in this instance it's more than one--there has to be some one who believes in an idea so strongly that they can convince others. And I am here as a member of the National Commission to tell you that the advocate in this instance was Rod Swartz. If Rod had not continually pressed the National Commission on this matter and stood as a strong advocate when it came to spending priorities, the money might not have been spent for a study at all, because there were many pressing needs. It was Rod who pressed for continuing education to have a top priority, and I wanted to pay him this tribute.

Nettie Taylor: Thank you, Bessie. Thank you, Rod.

I'm going to turn this over now to Ruth Patrick, who is going to explain to you about the programs for the rest of this Assembly meeting.

Ruth Patrick: I'd first like to introduce and thank the members of the Assembly Task Force for their important role in first designing and then implementing the Assembly meeting. I'll just read off their names and then ask them to stand.

First of all, Mary Baxter of the CLENE staff, who looked after publicity and local arrangements; Frank Birmingham, from Mankato State University, Minnesota; Julie Blume, Assistant to the Director of Education, Medical Library Association, who coordinated the Continuing Education Fair; Pat Broderick, Pennsylvania State Libraries, who coordinated the consultants; Muriel Fuller, Professor, University of Wisconsin Library School, who will be leading one of the workshops;

Travis Tyer, Senior Consultant, Professional Development, Illinois State Library, who is coordinator of the workshop leaders and recorders, and who is also going to be the chairperson of the task force for the next Assembly meeting, so if you have ideas that you'd like to pass on to him, do take the occasion of the next couple of days.

Nettie Taylor: The consultation rooms are listed on the green sheet in your registration packet with the list of consultants. We will begin the afternoon session in this room at 2:00 P.M. We are adjourned.

Travis Tyer: It is my distinct pleasure to open the first program segment of the Second CLENE Assembly, and since we're on a rather tight schedule we want to begin as nearly on time as is possible. There are lots of good seats up here in front, and you're going to have a good time during the next few minutes, so you might as well get on up front and be on the firing line with the rest of us.

I have one housekeeping announcement that needs to be made at this time: those of you who are planning to put out materials and exhibits for the Continuing Education Fair from 9:00 until 11:00 this evening should make plans to leave the second discussion group 15 minutes early in order to come to this, the Grand Ballroom, and set your exhibits up. Julie Blume will be here to give you your assigned space and help you in any way she can.

Our keynote speaker this afternoon in Dr. Alan Knox, Associate Vice-Chancellor for Academic Affairs at the University of Illinois at Urbana and Chairperson of the Office of Continuing Education and Public Service. His career, before joining the staff at University of Illinois includes appointments at Teachers College, Columbia, the University of Nebraska and Syracuse University. All of us who are associated with CLENE are constantly amazed at how much work Betty Stone accomplishes and how involved she is. Well, Alan Knox is another one of those persons who seem to cram 36 hours of activity into each 24 hours. It has been my privilege in the four years that I have been at Illinois to be associated with Alan in a number of ways and it is an extremely pleasant experience to introduce him to you at this time. Dr. Knox.

THE KNOWLEDGE BROKER

Alan B. Knox, Keynote Speaker

Thank you, Travis.

During the next 20 or 30 minutes I'd like to talk with you about action -- action that you can take regarding the professional knowledge and competence of library personnel, and in so doing preserve time for you to make some comment and to raise questions regarding this topic. I've been impressed as I've followed the development of CLENE, with your efforts to draw together materials and people to facilitate the process of continuing education of library personnel. Your effort is timely. Similar efforts are occurring in a number of professional fields, and the parallel reflects recent developments in this country and in the professions.

When you consider the amount of attention that continuing education, generally, and continuing professional education in particular, is receiving in recent years, it seems to me incredible that twenty or thirty years ago continuing education of adults was as invisible as it was.

Thirty years ago was before the Adult Education Association of the U. S. A. was formed. Some people in 1947 realized that they were very much concerned with educational programs for adults. They had been active in a number of associations such as the American Library Association, and the National Education Association which had a history of 10, or 20, or more years being concerned with educational programs for adults.

They may have been active in the American Association for Adult Education that was formed in the '30s, and that went out of existence at the same time that the Bureau of Adult Education within NEA was ended to form the Adult Education Association, but thirty years ago that event was still a few years in the future.

A large proportion of the people who were then working in the field of adult and continuing education didn't think of themselves as being part of a broader field concerned with educational programs for adults. They were doing their job within a personnel department, in business and industry, or they were working with university extension programs, or the public school adult education programs, or in libraries, or in the dozens of other settings in which educational programs for adults occur. For the most part they were not aware of the wide range of educational programs for adults that were going on in other settings, from which they could have learned a great deal.

The mass media back then very seldom gave any attention to educational programs for adults. It would be a singular event to come across, during a year's time, a reference to an adult participating in an educational program. To have this referred to over radio, or in a magazine, would just be very, very unusual.

By contrast, recall during the last year the number of instances when you come across references in the mass media to adult and continuing education programs. If you are at all alert to this, you can't read the local newspaper in a week's period of time, without coming across two or three references to some adults participating in some sort of educational program. It's relatively standard now. In the course of a

week or two on television it's likely that there will be some reference, even in a situation comedy or a drama, to an adult participating in an educational program.

Many of you, I'm sure, saw the September 20, 1975 issue of the Saturday Review that was devoted to lifelong learning -- an entire issue of a national magazine devoted to lifelong learning. Some of you may have seen the Spring 1976 issue of Daedalus, the magazine of the American Academy for Arts and Sciences. It was devoted to "Adulthood" and announced that the next century is the century of the adult. Two centuries ago attention shifted to childhood as a particular area of concern, and during the last century we have been preoccupied with adolescence, but this -- this is the century of the adult.

I propose to describe a leadership role concerning the planning and conducting of continuing education programs for adults in many fields, and I have labeled this leadership role the "Knowledge Broker." I am concerned, in talking about that knowledge broker role, with efforts to link the kinds of action problems that library personnel confront as part of their professional activity, to outside knowledge resources that would be helpful to them in trying to perform that role more effectively. In broad outline, this knowledge broker role is probably more familiar to library personnel than to any professional group in this country. Let me describe a rough analogy that seems to me to be very useful.

Imagine for a moment that you are working in a library setting -- a public library, a school or university library, a special library -- any library setting. Assume for a moment that it is not one of those instances in which you are very busy to finish a task, or that you are in a grumpy mood, when

a patron comes to you. You might be an administrator, or a librarian, or a clerk. Let's assume that you don't just brush this patron off, quickly answering his question and going on about your business.

Let's assume for the moment that you're acting out the best practice, as reflected in the literature and the tradition of the library field. In all probability, that patron has some particular problem or concern that has brought him to the library. He is looking for information; he's looking for materials; he's looking for -- something. He has the question already formed. If he already knew exactly what he wanted and exactly where it was located, he wouldn't bother you. He would go directly to that location, and obtain what he wanted (and he would probably check it out before he left with it.) However, the fact that he was not entirely sure of what he wanted and exactly where it's located was the main reason that he interrupted you.

Probably the question that he asked was not precisely phrased. Probably he hadn't thought through exactly what it was that he wanted, and how he wanted to use it. When he asked a question it probably was not entirely clear to you what you can best do to help.

Probably you will ask a question or two -- ask about the material, ask about what he is already familiar with, ask about the depth he is interested in going into, and so on. You may also ask if he is familiar with some of the materials and aids that exist in the library to enable him to locate what it is that he is trying to find. So, an early task you have as a librarian is to figure out what his problem is, what he wants to know, what he wants to find out, along with something of his background, so when you do give him some suggestions or assistance, it serves his purpose well.

Once you know that, you have several options. You can say, "Wait here a moment, and I'll go get it for you and bring it back to you." But probably you won't do that. Instead, you would try to accomplish two objectives. One is to help him locate the materials that he's looking for, the second is to help him to become a more effective user of the library. To accomplish this objective he should discover that there are some ways in which he can use material such as the card catalog and the Reader's Guide to Periodical Literature, Current Books in Print, and reference books in a selective way to identify some of the items that seem relevant to his purpose. You help him to be able to select from the wide array of materials, those relatively few items that are just what he wants.

I would submit that this process with you as the librarian helping an adult as a library user, is the basic process that I'm referring to as the knowledge broker.

What I propose to do is to recast the roles a little, and to talk about each of you as CLENE members, as someone who plans and conducts continuing education programs for library personnel. I propose to discuss your role as a knowledge broker who facilitates the continuing professional education of library personnel. In this role, the persons you are trying to assist are library personnel instead of the general public. Nobody wears a little badge on their jacket or has a little sign on their desk saying "Knowledge Broker." Nor should they. It's an abstraction. It's a way of describing a role or a function that somebody can perform usually for some portion of their time, not as a full time responsibility.

Who is likely to perform the knowledge broker role? In a smaller library setting, the director of the library is the most likely person to

do so in relation to library personnel. The knowledge broker responsibility is part of effective supervision and staff development. In a larger library setting it may well be that there is somebody who has a specialized responsibility for personnel or staff development including attention to identification of outside knowledge resources, new developments nationally, at state libraries, or at universities, and for bringing these outside resources to the attention of the people who are working in the library, as technicians, as librarians, and as administrators.

In states where there are library systems that encompass a number of public libraries, personnel who work with those library systems have as a part of their responsibility a knowledge broker role where the beneficiaries of that role are library personnel.

Some faculty members, in some library schools, are very much concerned with a knowledge broker role, and see it as a part of their responsibility trying to make more accessible to library personnel, materials and ideas of other people that can enrich their careers and increase their competence in the library field.

In this Bicentennial month and year that serves as a hinge between our second and third centuries, there are some parallels that relate to your experience here in CLENE. And some observations about Thomas Jefferson are instructive because of the parallels between the knowledge broker trying to relate knowledge resources to action problems, and Jefferson, who so typified a combination of action and knowledge. The fields in which Jefferson was active -- as a farmer, as an architect, as a statesman, as a scholar, confounds the stereotype that there are some people who are thinkers and there are some people who are doers. His ability to perform

effectively in both worlds is very impressive. Add to that Jefferson's personal commitment to self improvement, through work and study, his concern with drawing from the lessons of the past in order to deal more effectively with the active present. As Erikson pointed out in his recent book, Dimensions of a New Identity, based on his Jefferson lecture of several years ago, Jefferson was not only concerned with his own identity as a person, with trying to fit together the somewhat uneasy segments of his life that related to action and contemplation, but was also concerned with the larger social system that was then in the process of rapid transition. Jefferson's way of dealing with stability in a time of rapid social change was to concentrate on deliberate changeability, to build in deliberate mechanisms that facilitate the sorts of change and ferment that he was so concerned about.

Another useful concept from Jefferson's experience and ideas is the importance that he placed on a communal network; a network of other people who are physically and psychologically close enough to each other that there could be the type of interaction regarding ideas that seemed to him to be the essential setting out of which both stability and change could be dealt with.

As you consider the entire range of professional fields it is clear that there is much ferment and change within professions. Continuing education is a way of trying to deal with both stability and change under changing circumstances. For example, within the health professions physicians are trying to describe, carefully and in detail, how physicians spend their time. Pharmacists are trying to deal with the question of standards. How do you decide which practices are more desirable than others?

Nurses are trying to deal with the question of role relationships with physicians, and with emerging types of health care personnel. These changes cause nurses to rethink their roles. One of the functions of continuing education is to encourage professionals to consider issues that are fundamental to professional practice as a springboard for planning educational programs that will not only be beneficial to individual members of the profession, but to help them, in turn, to advance the profession.

I'd like to turn next to ways in which you might perform the knowledge broker role. I realize that each of you, in the course of the last year or so, has found yourself in some instances as a participant in a continuing education program, in other instances as a teacher, or resource person, and at other times as a planner of a continuing education program. However, I'd like to focus now on the knowledge broker role as a critical one to help in the planning of continuing education programs.

There are three broad dimensions of the knowledge broker role. The first is that you have contact with practitioners. You should be familiar with the daily activities of library personnel if you want to help plan more effective continuing education programs. This entails having a sense of how they feel about what they do, as well as an analytical sense of what they do. This is one of the reasons why knowledge brokers ought to have at least one foot in the camp of the personnel with whom they're working. If you are working with library staff in a neighborhood branch of a library in a large city, it seems very important that you be in that type of a work situation, or should have recently done so, or should have very close continuing connections with what it's like to work in that particular

work setting. It seems only in this way is it likely that you will be sufficiently familiar with the concerns, the educational needs, the action problems that practitioners are confronting, to be able to help identify relevant resources.

In my example where the patron came into the library, it was important to get some feel for that person's background, and what they wanted before you began to think, "Now which of the resources that exist in the library do I call to his attention?" It likewise seems important to have some real feel for the work situation in which practitioners are involved if you are to effectively identify relevant knowledge resources. Two broad objectives should be kept in mind in working with practitioners: the improvement of patron services, and the enrichment of library careers.

A second dimension of the knowledge broker role is a familiarity with knowledge resources that are likely to be relevant. Again returning to my example, as a member of the library staff you are likely to be familiar with many resources that exist in the library that might potentially be relevant to the interests of that patron. If you didn't know any more about what was in the library than the user who came in the door, it's likely you wouldn't be of much help. On the other hand, if you told them all you know about what was there in the library that might potentially be relevant to their interests, it would be overwhelming. It would be so discouraging at that point to most of the people who came in the door, that they'd turn around and go right back out again. So you need to be more knowledgeable than the person you're trying to help, but you've got to restrain yourself from sharing all the information that you know about that might be relevant. In working with library personnel, this is a major task, to

not only be knowledgeable about what's going on, but to have some basis for being selective, about what you call to people's attention.

Fortunately, through CLENE you have many resources available now that were not available a year or two ago. As you think of the newsletter, the list of continuing education courses and programs for 1976, the personal contact that many of you have through ALA and other groups and now through CLENE, there is a familiarity with national and regional resources that you can bring to bear when you talk with anyone interested in attending a continuing education activity, or pursuing a focused plan of professional reading.

In addition to the national resources that are available to all of you, each of you within a state or region where you work has a variety of other resources that can be brought to bear. Library resources, obviously, such as those from a state association or state library or a library school. In addition to those resources from the library field, there are many resources that exist locally that don't have "library" and "information science" any place in the title but that are very relevant to library personnel. Such resources may have to do with management, communication, or human relations, and they may be designed for people in business, education, social work, or the general public. However, they can be very useful to practitioners in the library field whom you are trying to help. To the extent to which you are related to those networks at the local level you can perform the knowledge broker role far more effectively.

The third dimension of the knowledge broker role is the critical one. That area has to do with connecting action problems and knowledge resources. It's relatively easy to be familiar with the problems of running a library or performing a particular role in a library. It's relatively easy to keep

track of a range of knowledge resources. As any faculty member in a library school will tell you, there is a great flow of relevant information, and you can associate yourself with those materials and people related to them. But I would submit that it is relatively difficult to work back and forth between those two; to have enough of a sense of the action problems that practitioners are confronting that you can see the relevance of certain knowledge resources, identify those that are relevant, and then help people utilize those resources.

I find it helpful to conceptualize the movement back and forth between action problems and knowledge resources around five components of what I've called the "mentor role." These components are needs assessment, assessment of resources, selection of objectives, selection and organization of learning activities, and evaluation -- activities that constitute the stock-in-trade of most people who plan educational programs for adults. These components are not only useful for someone who is going to teach adults, and for the individual adult who continues his education on a self-directed basis, but they're also useful to you in your role as a knowledge broker. I'll next discuss each of those five components in terms of what your role would be.

Regarding the <u>first component</u>, assessment of needs, one of the things you can do as a knowledge broker is to help to publicize the variability and deficiencies that exist in professional practice generally. In many fields, people are not very familiar with the ways in which other people go about doing things. I had the experience a number of years ago of surveying the choices and decisions that juvenile court judges make. That information was summarized and provided to them a week or two before they

attended a week-long institute to help them to deal with their roles as juvenile court judges. There was little that could have been done then that would have been more effective in giving them a better sense of their own way of working. They don't have much preparation. Juvenile court judges learn on the job. They are elected, or appointed, usually having been an attorney, and suddenly they're a juvenile court judge, and they usually evolved their own arrangements. To see the variability of practice and the range of satisfaction with the results, was one of the most exciting educational experiences I've ever been through. Sometimes just knowing the variability about what people who have jobs just like your own do and where it is working well and where it is working poorly and to put your own experience in that sort of perspective is a very useful way to identify some of your own educational needs that you'd like to work on further.

Another contribution that you can make is to publicize rationales and procedures for needs assessment. This includes some of the ways in which they can assess their own educational needs, as well as ways groups of people can go about doing needs assessment. One part of that assessment is helping people to compare the way they are performing right now (what they know and what they do) with an attainable standard of desirable practice. And one way to concoct that attainable standard has been referred to in some fields as a "college of peers." A number of people who are very able practitioners describe (out of their own experience and their sense of the literature and what other people are doing) very effective practice in various areas, which allows individual practitioners to compare what they are now doing against the standards of practice. This provides a very useful way to encourage the needs assessment activity that will help in the planning of more effective continuing education programs.

In addition there are inventories, use of library records and arrangements for people to observe practice and share their insights. The familiar argument about needs and wants and whether the assessment of needs should be done by the individual or somebody else who is more impartial is a silly argument. It's one of those "either/or" questions where the answer is clearly "both/and." The viewpoint of the individual as to where that gap is between where he is and where he'd like to be is very, very valuable, and it helps to increase the learner's commitment to do something about closing that gap. But people tend to be somewhat myopic, and many times someone who works in a related field or is in a role of an administrator can provide some useful insights as to what the practitioner is doing and what he might be doing, to hold up a mirror, in a sense, to current practice. So it seems helpful to obtain a view of the gap as seen by the potential participants in the continuing education program and by others as well. Sometimes the comparison of those two views of the need may be more valuable than anything else.

The second component is diagnosis of the setting. It is important to assess the setting within which a continuing education program is going to be planned by an association, or by a library, or by a library system. To assess that setting in terms of the resources that are potentially there, that can be drawn upon for planning an effective continuing education program; to assess that setting in terms of the facilitators that are already helping you in terms of the reward structure, or available materials, or time availability, and also the barriers. The barriers include the influences that are getting in the way, that make it difficult for you to plan and conduct effective programs of continuing education. Part of your task

is to help people who are out there planning continuing education programs for library personnel to have a greater awareness of the setting within which they are operating along with the materials and human resources that they might draw upon. But also, you can help them to recognize ways to increase access to resources, to make them more available, to have them packaged in a way that people are more likely to use them.

Another way that you can help is to encourage libraries, or state libraries, or associations to assume more responsibility for supporting and conducting continuing education programs for individual renewal and for organizational renewal. Those states that have library systems spanning across a number of public libraries have a unique opportunity.

The third component is setting objectives. In thinking about objectives for continuing education of library personnel, there are three somewhat related notions that are useful. One of them has to do with the career aspirations of library personnel. What is it that they see as a part of their experience right now that they would like to pursue further, to strengthen? What do they see as some next steps leading from what they are doing right now to some other segment of their career? So career aspirations can be a very valuable source of potential objectives for continuing education programs.

The second notion is the use of standards as criteria for performance. What represents a very, very effective way to do that sort of thing?

The third notion is the clear statement of educational objectives. It is helpful to state as clearly and precisely as possible what it is that somebody should know or be able to do as a result of a successful

continuing education programs. In addition to clarifying those distinctions, it is useful to share with the planners of continuing education programs a rationale for focusing on a relatively few objectives.

One of the reasons why more professionals do not engage in more continuing education activities than they do is that the number of things that they don't know but ought to know is so great that it's overwhelming. The tendency is just to throw up your hands and say you just don't know where to start. But if there is some way to pull out some particularly high priority objectives, where there is something they're interested in, based on some new and exciting ideas, the inertia may be overcome. Encouragement within the organization or career prospects may yield priority objectives.

The fourth component is the selection and organization of learning activities. How people spend their time in a continuing education program definitely makes some difference. It seems to me that to the degree with which you are familiar with a wide range of ways in which professionals can learn, you'll be more likely to help people select those that seem more appropriate under the circumstances. I think it is appalling that over the years there are so many attractive and effective ways by which adults can learn, but we select two or three or four of those almost all of the time, and ignore most of the rest. When you consider the retrieval procedures that are now available to select print materials, and the simulations that have been developed to provide a way of getting a sense of the complexity of a topic, and the Learning Exchange, it seems a shame to restrict ourselves to so few methods.

Learning Exchange personnel ask people who want to learn to describe on an index card something of their background and what they want to learn. People who want to facilitate learning indicate what they are willing to help

somebody learn about. Then the index cards are exchanged and people work out the arrangements for themselves. There are thousands of people each year who participate in the Learning Exchange and work out individualized arrangements for learning.

In the performance audit, people within an organization look analytically at the way in which part of that organization functions, and then proceed to ask "What can we learn to improve the functioning of that part of our organization?" As you consider that wide range of possibilities, it seems to me that part of your task as a knowledge broker is to help people to understand that that range of learning activities exists and to encourage them to select and organize the types of learning activities that are most likely to be effective.

The fifth component is evaluation. One of the tasks that you can perform is to alert persons about the range of evaluation instruments that are available. Evaluation instruments are especially useful when they are accompanied by a report that indicates what people discover from the use of the evaluation instrument. This enables you to use that report as a reference point to interprete what you find. Program evaluation findings can focus on various aspects such as the resources that were available, the participants and their backgrounds, the effectiveness of resource persons, and the materials. Program evaluation can include assessment of the process that goes on during the continuing education program and the results at the end. Results can be reflected in people's satisfaction, or what they apply after the program. It is helpful to obtain information that describes what actually took place during the continuing education program, but also what the expectations of the planners and participants were beforehand. Program evaluation should compare what the expectations were

for the educational program with the description of what did occur, and look at the difference as the basis for using your evaluation findings for program improvement if the results are not satisfactory. As a knowledge broker, you can broaden the perspective of planners regarding effective approaches to program evaluation.

In summary, one of the tasks that you can most effectively perform as a knowledge broker who assists those who plan continuing education programs for library personnel, is to publicize case examples of library personnel who have effectively planned and conducted continuing education programs, and to help people see more holistically the way in which that process works and the results that come from it. The payoff would be, I would hope, that you would help library pracititioners to develop a richer repertoire of effective strategies for alternating between the types of action problems that they confront and relevant knowledge resources.

Ruth Patrick: Thank you, Alan. I think we have all seen the analogy you have drawn for us here. And now, the first question.

Leon Montgomery: Let me preface my two questions with the notice that at the University of Pittsburgh we have a formal educational program in what I perceive you are calling knowledge broker. We choose to call that person the "information counsellor," but certainly it has all those properties. This is within the Information Science Department in the Graduate School of Library and Information Sciences.

Two questions. One, the knowledge broker, at least as you talked about him here, seemed to be mostly assigned to the library area. Do you perceive such

a person also working outside the library area, for example in court systems, or government and education, or other places?

Alan Knox: The first place that I published anything on this knowledge broker or linkage agent role was in the health professions rather than the library field and I tried to identify people as various parts of the health delivery system who were concerned with continuing education for health personnel. It included elaborate systems such as MIST and other computerized systems as well as print systems for identifying information that was needed for people in the health sciences in order to perform their role more effectively. I think you can find people who perform the knowledge broker role within some state education departments, schools of education, school systems, and intermediate districts, for people who are in the field of education as school teachers, or administrators in the elementary and secondary schools. There have been a number of national studies of this role as well. So I think you can find this functioning in a dozen professions right now. Some of the concern for technology transfer, for people in engineering is an example. I am using the term "knowledge broker role" in a generic way within continuing professional education in any professional field, even though many of the people who might be technically competent to be doing this may have come out of information science, as you describe it.

Leon Montgomery: Certainly we share your perceptions on that one.

The second question is "Do you have some specific suggestions with regard to continuing education that you believe this group might pursue or might develop? For example, the notion of the knowledge broker, or counselor, requires, it seems to me, considerable behavioral kinds of training,

at least in terms of information seeking behavior, and I wondered if you have any specific suggestions for us.

Alan Knox: I have three. One is to locate the person who is going to perform that role for a group of professionals as close as you reasonably can to where those professionals work. If you have the choice of whether you're going to locate a knowledge broker within a school system, or library system, or a factory, or instead to locate him someplace where he's going to travel and be there once or twice a week, my own conviction is that it is more difficult to establish linkage with a client system than it is to establish linkage with external sources of information, so it would seem preferable to locate the knowledge broker physically close to the client system.

The second is that there are a number of bodies of knowledge that would be helpful in training people in this role. Ronald Havelock of the University of Michigan has, in the past six or seven years, been at the forefront of producing summaries of information regarding the various ways of encouraging dissemination and utilization of scientific knowledge. The knowledge broker or linkage agent is well grounded in his findings. He has a book on training of change agents, in which he identifies a number of relevant bodies of content. His conclusions about diffusion and adoption of practices and systemic linkage between knowledge systems and client systems is exceedingly helpful. Another aspect of his work has to do with interpersonal relations, effective working relationships with people who are in that client system. Such relationships include an understanding of communications, of the sources of resistance on the part of clients, and trying to encourage change and growth, while minimizing

the defensiveness that so often occurs. In preparing people to perform the knowledge broker role well, there is much useful information available.

The third is that it is helpful to have some sort of backup system, some way of providing the people who are in the knowledge broker role with up-to-date information. There is a good deal of information on the opinion leader; the person within the circle of friends that each of us has who tends to be particularly knowledgeable on some topic, and to whom people turn for advice, ideas, and new information on that topic. The opinion leader is only effective when he or she has information. When the opinion leaders don't have anything that the clients don't already know, they drop out of the opinion leader role. The same basic point applies to the knowledge broker role. If the knowledge broker starts out by providing the client system with some good ideas and suggestions, but doesn't stay current, he or she will lose their credibility as well. Backstopping people who perform the knowledge broker role is important.

Nettie Taylor: I'm Nettie Taylor from the Maryland State Library Agency. Would you comment on the relationship between the expectations of management and the expectations of the staff in terms of these roles?

Alan Knox: All right. There was a study done in secondary education about ten years ago on the in-service education of teachers. One of the major conclusions from that study was that a practicing secondary teacher in the social studies area, who had some released time to devote to staff development of other social studies teachers in the secondary school, could be far more effective in trying to facilitate many types of curriculum

change, and staff development than could the principal of the secondary school. One of the explanations that was advanced was that the administrator is in the position many times of having to deal with personnel problems, and sanctioning, and budgeting, and that these other roles get in the way. You hear the same sort of argument from the counseling field that "If I have to be a counselor in a school situation but also the truant officer it makes it very difficult for me to convince the kids that I'm really on their side when they want to talk about something to a counsellor."

Another relevant point comes from a study for which the final report is now being duplicated, a needs assessment of the continuing education needs of library personnel in community college libraries and learning resources centers in one state. One major finding was that the pattern of continuing education needs that were identified by all the various categories of library personnel tended to overlap very substantially, with one exception. That exception related to the role of the director of the library. The continuing education needs of the director of the community college library or learning resource center departed very substantially from those of other library personnel.

A recurrent problem is that administrators are heavily represented on planning committees and when deciding on continuing education objectives often emphasize what <u>they</u> need. One sound concept in planning continuing education programs is to get "they" in the process of helping to plan what "they" need.

<u>Nettie Taylor</u>: I think that's right. I think that's the point I was really trying to get at because I don't know how you relate what the

administrator feels or the director feels are the deficiencies or the needs of his staff in continuing education and the perception of the staff itself, and how you bring these two together if they are completely different.

Alan Knox: There is a wonderful analogy that some of you are familiar with from the management field as a recommended "good practice." If you are a work supervisor, once a year or so you ask each of the people you supervise to describe what it is they've done during the last year, what they see their job as being. You also ask them to identify how they would like to have things different. How they'd like their job to change, or how they think their productivity could be more or different than it is at the present time. In parallel, the supervisor does the same thing for the employee. The supervisor describes what he or she sees as that employee's performance during the past year and identifies the goals that the supervisor thinks are important for this next year, and then they exchange those two descriptions. Then they sit down and talk about it and try to come up with some agreed upon notions of what is really important, some objectives you have to achieve as a necessary condition of performing your job satisfactorily if you're going to get a raise or you're not going to get fired. In addition both the supervisor and the employee would try to identify some specific tasks that the employee will try to work on during the coming year, that the supervisor will try to help the employee accomplish. The basic notion is a very useful one in thinking about both the needs assessment part of this, and the planning of continuing education activities, to try to close the gap between where the person is and where he or she would like to be. I find the notion of the gap

useful in bringing together some of the needs assessment information and combining it with the notion of it being viewed by the potential learner in the continuing education activity, but also by some other people, who have a stake in the performance of personnel in an organization for which they have some responsibility. So I think that both viewpoints are valuable and can be reflected in the planning of continuing education programs.

Ruth Patrick: I'm especially delighted to be able to introduce to you now Jim Sucy, Manager, Education Market Services, Eastman Kodak Company, situated in Rochester, New York, our next door neighbor to Syracuse. There are several reasons for this. First of all, Jim has been involved with CLENE since its beginning in 1974 with the National Commission on Libraries and Information Science sponsored study to develop a nationwide plan for continuing education. He is one of the hundred or so people that we interviewed in depth to get ideas on how to develop this grand plan we were working on. When we contacted him at the suggestion of Julie Virgo, we were looking for an exemplar program in business and industry. It was a memorable occasion for me, because ideas that Jim presented to me in that interview deeply influenced my approach to the design of continuing education programs. He introduced me to a concept I have since had reinforced by Malcolm Knowles and by Alan Knox, the idea that an assessment of what an individual's continuing education needs are begins first and foremost with an analysis of the skills or competencies that that person needs for his or her present job or the one aspired to in the near future.

The year following that interview the class to which I was teaching Staff Development and Continuing Education visited Jim at the Eastman Kodak Training Center in Rochester, and you will be seeing some slides, I believe, of this truly impressive training center. We saw the presentation that you will be receiving this morning, and again it was a memorable learning experience for me and the class. Jim has been involved in various

training functions at Eastman Kodak over the years he has been there: He's instructed, developed, and managed many technical and managerial programs. Until recently he was Director of the educational development at the Kodak Educational Center.

Talking to him last night I discovered that in his spare time he really does get quite involved with libraries, consulting on various projects, and he is very involved with what they are doing, and I'm very pleased to know that he did spend all day here yesterday finding out more and getting updated on what this new organization has been up to. He is the originator of programmed instructional lessons, audiovisual programs, educational models, educational simulators, and various other educational media and programs. So I am very much looking forward to this refresher session for me, and I hope you will find it as rewarding as I did.

Jim Sucy: Thank you very much, Ruth.

I hate to stand behind a podium so I hope you'll bear with me if I'm moving around while I'm talking with you. I can hardly wait to hear what I have to say, after that introduction.

The fact is I'm not sure what I'm going to say right now, but I've been trying to put my thoughts together as to how I can share with you some experiences and some problems that we've had in industrial training in a way that will make them meaningful to you in helping to solve your problems as far as continuing education is concerned in libraries. Let me qualify what Ruth said just a bit, to the extent that I know practically nothing about libraries, or librarians, or how to run libraries. But I think that there is a common thread in all types of training problems that we have in industry, or that we have in our public schools, or that you people have in your libraries, that is useful at least in discussion. We'll work on that assumption this morning.

Let me get into what I want to say by mentioning a little about what Ruth has already told you about my function at Eastman Kodak--have you all heard of Eastman Kodak? (Laughter) We're a small photographic company up in Rochester, New York, which if you're not from the East, I'm sure you thing we're from New York City, but actually there are places in New York state other than New York City. As a matter of fact our city is about 350 miles from New York City.

These slides show some of the Kodak facilities. The corporate headquarters for Eastman Kodak is in Rochester, New York. This is Kodak

office, built during George Eastman's days. The total employment for Eastman Kodak in the world is well over 100,000 people, and are scattered around the country and around the world. On the left is our Camera Works, the plant where we make all the cameras, and then the little pictures on the right show Kodak Park, Tennessee Eastman and Texas Eastman, where some of our chemicals and films and papers are manufactured. In the Rochester area there are about 50,000 people working at Kodak. Many of those people have to be trained year after year. As a matter of fact, many people are unaware of the extent of training that goes on in industry. I think you are familiar with the figures for public school education and that in 1976 the cost, to us, of public education is well over one hundred and twelve billion dollars. It has been estimated that more money than that is put into industrial and professional training. You can look on that as being continuing education, and it is certainly extensive.

Now, we can break down the kinds of training we do into three broad categories: the orientation type of training, which is the familiarization with the company, or the job; then the actual job training, which is the initial training that an individual receives in order to be brought up to competency in that job; and then there is the continuing education, or refresher programs, that go on for the rest of the individual's working life. So we touch almost everybody in the company on a yearly basis with one of the types of training.

Ruth mentioned the Education Marketing Center, and on the left is a slide of the four buildings that make up our campus, if you want to call it that, outside of Rochester, New York. It was during the

time that this campus was being built that I was Director of Instructional Development, and we knew that we were going to have some nice new facilities. We were concerned that we were going to move the same old training programs into those new facilities. Further, we knew that the people's expectations of the quality of training is dependent upon the environment. In other words, you're not quite as bad if you have a poor training program in a poor environment, but when you have a poor training program in a nice environment, people notice it more. So, we had to do something about the quality of our training programs, to make sure that they were top notch. We had a staff of 12 or 14 people who devoted full time to writing training programs, and we wanted to evaluate these programs. We wanted to insure quality programs. Time was running out and the building would be completed; we had a choice of either trying to pull ourselves up by our bootstraps or going outside and getting some help.

Because of the time, we chose to go outside and hire a consultant in the field of educational technology and behavioral sciences. We looked around at many of these consultants. Frankly, many of them were very good from a theory standpoint but did not have practical experience in industrial concerns. We found one that had at least one foot on the ground, and hired him. We had a strange contract with him. We didn't hire him to write programs for us; we hired him to train the people on the Educational Development staff to be consultants just as he was. Now that puts a consultant in a unique position, because if he fails to train those people to be just like he is, then he doesn't get paid. On the other hand, if he succeeds in training them to be just like he is, he doesn't have any more business with you because now he's produced a lot of people internally

that will do the job for him. Over a two or three year period we hired him on successive contracts until we felt comfortable flying on our own.

But once you train people to do something as complex as developing training programs, how can you insure that they will continue to do so, and how do you insure the quality of the product that they produce? The second half of those contracts was to provide us the same kind of quality programs in the future, so that at the end of the contract with the consultant everything just didn't slide downhill from there on.

What I'm going to be sharing with you today are the techniques that we use to remind our staffs to go through a systematic process. Now I'll show you a lot of paper work and guides and things that we use to do it. These are self-reinforcing, self-motivating approaches that we felt are necessary, at least in the beginning, and many of these things you will not want to bother with yourselves. It's too complex; it's too detailed; it's too much work. That's the story we always hear. On the other hand, once you have internalized the process, you find yourself thinking that way, approaching all problems, training and otherwise in pretty much the same analytical, systematic, problem-solving approach, so that you essentially internalize these guides as a way of thinking.

The Training Center that you see here, and some smaller satellite ones around the country, help us train about 50,00 people a year in various training programs which you might consider for the most part continuing education. In the photographic business we had a lot of technical changes. We come out with a new product or an improved product every three working days. Somebody has to be trained how to use that product. Many of those 50,000 people are our customers, people who are in the business of using

photography as a living. So we have a big training problem, and as I say, it involves many people, not only our own people, but also many customers, in all varieties of training situations.

Now for lack of a better name we could call this approach "Performance Analysis and Instructional Design." The performance analysis is the front end analysis that really makes the difference between starting off on the right foot or starting off in the middle of the process. Many times people sit down to write off the top of their heads, with the assumption that they know exactly what has to go into the program. One of the things that this system has taught us is "Don't even make the assumption that you need a program until you test it." You may not. I dare say that 25% to 50% of all money spent in industrial training programs and professional training programs is probably spent on training programs that are either not needed in the first place or are the wrong solution to the problem. These programs are very poor training programs, not right for the people to whom they are being given. That's probably a conservative estimate. To make sure that you have the right program for the right people you have to go through a little more work on the front end analysis.

Now there are many ways of breaking up a systematic approach into steps. Everybody has their own method of doing it. In our particular case I have arbitrarily broken it up into a half a dozen different main points here. I'll cover these briefly and then we'll go into more detail as far as the kind of decision-making process that you people should be going through every time you approach the design of a new training program, or the selection of a training program, or the evaluation of a program.

The first step says "Define the problem."* And most people say, "What do you mean, problem? I don't have a problem. All I want is a training program." Well, if you don't have any problems, in other words if everything is as good as it can be, don't spend money on training programs, don't bother doing anything. You're lucky, you're one of the few people where everything is as good as it could be. By the way, let me have your name and address, because I'd like to know what you're doing that the rest of us are not doing. There's always some room for improvement.

When we say "problem" we're not necessarily talking about the thing you think of as being a serious problem. A problem is usually identified with some little red flag going up to say "There will be a policy change next year and that is going to create some different things that we'll have to take care of." "A new technology is coming along and we're going to have to prepare for that." That's a problem. That's an anticipated problem, that's an indicator that something should be done, and that's really all we mean when we say "problem." It's the difference between the actual performance that is going on and what you would like to achieve. That difference is what we're talking about as the problem area.

Then we take a look at the target people. Who are these people we're training? Where are they located? How many of them are there? What are their deficiencies? and all the other information that we can gather about the proposed audience for our training program. In addition to that we like to identify resource people. If we have to put on a

---

*"Performance Analysis and Instructional Design" worksheets follow Mr. Sucy's speech on pages 94-103.

training program for these people, who can we turn to with the expertise that we need to do this, to do that? Who are our resource people? Somewhere very shortly we have to identify the scope of the problem, so that we'll find out whether we have enough money to do it, or enough time to do it. Is it a huge four-year project that's going to take $100,000, or is it something that has to be done next week for $350.00? Somewhere along the line we have to have a meeting of minds and an agreement among the people who are involved who have responsibility as to what the size of the problem and the project is. Those are sort of the things that help us to get started.

Next we take a look at the job proficiencies themselves. We call it "mastery performance," and it's a job definition. I want to make the distinction here between a job description and job definition. "Job descriptions," and I don't know whether you people have them, I'm presuming some of you do -- right? They're about a page and a half of generalities. Most of them are that way. Job descriptions are fine for certain purposes. Our wage and salary department likes to have them as a way of putting a balance on people moving from job to job. But a job definition is a much more detailed emphasis of all of the tasks that go into a job and all of the criteria for doing those tasks correctly. We'll talk about that more later on.

(Incidentally, the symbolism of my taking off my jacket at the beginning of the show is to let you know that you can interrupt me and ask questions and anything else. An informal session is much to be preferred, so if I say something that you disagree with or if I say something that you don't understand, please let me know and I'll try to clear it up right then.)

Now we come to the part where we take a look at possible problem causes. When I was Director of Instructional Development at the Marketing Education Center, the most common introduction I had to our clients within the different market divisions at Kodak was "Give me a 20 minute slide program to do this, and this, and this." In other words, they came to me with their solution already in mind. I had to spend a great deal of time backing them up to try to find out what their problem was. Of course I got the answer that they don't have a problem, because they had already sort of skimmed over the surface and arrived at a point half way down the process telling them what the answer was going to be. Their answer may well have been correct, but we had no way of knowing unless we go back and we try to find out these things. Now it's interesting in our role as educational consultants that by asking certain questions at this point, we find ourselves being much broader as management consultants, because many of those problems cannot be solved by training programs. You have to be ready to identify those problems which cannot be solved by training programs, and to put those off to a side and recommend that management take care of those by some other means. I'm a firm believer in training programs, but if you put on training programs for training programs' sakes when they're not warranted, then that's a waste of time, money and people's talents. So we test for those causes and if it's not training we find alternative solutions. We have a branch to our educational design which takes care of managerial type problems. I'll tell you what those are in a little while.

Now once we've done that we take a look at our "mastery performance," those tasks which have to be done in a job. We take a look at all of them,

we see which ones are not being performed today, deficiencies in the tasks; if anything is being done correctly, we cross it out. There's no sense in providing extra training if people are doing those things right. We take a look at them and if there is some cause other than an educational solution -- other than those which are provided by an educational solution -- we cross those off, so that at this point in the game we wind up with only those tasks that are going to be solved by training. From those tasks we write our objectives.

It's taken us quite a while to get to the point of writing objectives, and that's often where people sit down and start to write training programs. They say, "Gee, we have to write some training programs, let's sit down and write some objectives first." You read it in all the books. My premise is "That's too late. Pulling objectives out of thin air, or off the top of your head, is not sufficient to validate them as far as basing training programs on them. So when we write our objectives they are very specific, they're tied in to tasks in the job performance.

We have to do some planning and some scheduling for writing these programs. Manpower, money, time, those kinds of bookkeeping things that you have to do in planning programs, and then we get down to the nitty gritty, the behavioral sciences of the learning problems that are involved, describing that behavior further. There are some very interesting things there, and despite the fact that I went through a school of education a number of years ago, I must confess that they didn't teach me any of those things in the behavioral sciences that I have since learned about developing training programs and so forth. So I have some very interesting things to share with you in that area.

Once you've done that, number 7 is probably at the bottom of the analytical list. In other words you've analyzed it right down to the nitty gritty and from there on it's pretty easy to put the pieces back together again. Because all along the line you've been analyzing and making decisions, and whether you know it or not, narrowing in on a solution. Once you've reached this point, then the solution is fairly obvious. You may have some choices as to how you want to do it -- but the material that has to be there is pretty well determined. So you can start to test a prototype, and you test it before you print it up or before you have your visuals made, or the final version of it, so that you can make changes in it while it is in a relatively inexpensive form. You validate it at that point, try it out on a real audience. See if it can do what the objectives said it could do. And if it can, okay; if it can't, you revise it and then you produce it.

Finally you interface it with the student, be it a lecture, a self-instructional unit, laboratory hands on program, or whatever, and last but not least you evaluate it. And by "evaluate" we don't mean just to send out a questionnaire asking "How did you like this program?" Anybody will probably say "Gee, we thought that was a great program," because if they don't, we might not invite them back for another one sometime. So you have to ask a great deal more about it than just the subjective. Sure, you want people to like your programs. That's natural. You want people to go away saying, "Gee, that's the best program I've ever attended." But, how about the efficiency of the program, the effectiveness of the program, the validity of the program, the cost-effectiveness of the program, the cost versus the value of the program? Did you put on a $50,000

program to solve a $100 problem? That's not very cost effective, and yet you see this type of thing being done, from time to time. This is a rough series of steps, then, that we go through, sort of a check list, in order to be sure that we don't jump to conclusions ourselves. It's very hard to keep yourselves from doing this. I could sit down with any one of you and say, "Tell me the training problem that you have," and by the time you're into about the third sentence, my mind is already leaping ahead to solutions to your problem. It's very difficult to hold yourself back while you analyze the problem, before you jump to those kinds of conclusions. So we use this guidance system to help restrain ourselves to ask the right questions at the right time before we jump to those kinds of conclusions.

This next slide shows a road map here, which (as I said, you probably can't see beyond the third row of tables) but I have a few copies down here in front for those, some of you, who might want or need a copy. But this road map is really only an overview in itself. It just covers the same steps, but at one level more detailed than what we saw, but that in itself is not the important thing. You can find these kinds of flow charts in every one of the educational journals. They'll vary a little bit in their form, but they go through mostly the same steps. No problem there. That's not the heart of the system, that's a road map of the system. What we think is the heart of the system, however, is the guidance sheets or the work sheets. Because they provide us with the self-discipline that we need to keep us on this track. They're a documentation and a check list to make us ask the right questions at the right time, before proceeding on. They tend to haunt you if you don't do that.

Furthermore, in addition to the documentation they also provide a communication to the other people who have to work on the project, so at least when you put something down on paper, somebody else will see it and either agree or disagree with it. We have a whole series of these worksheets, which are just a form to get us to ask the right questions at the right time. The structure of what I'm going to be talking about this morning essentially follows these worksheets and I'll be talking about some of those questions that we ask and the importance of some of them that are particularly critical.

Let's take a look then at worksheet #1, which is labeled "Defining the Problem." It's the starting point, it's the collection of data about the situation that you need to know in order to get started.

Most problems do not present themselves full-blown. Most problems show themselves only in the form of indicators, little red flags that go up and say "Something isn't right here." It may be a number of things. I don't know what your indicators are -- maybe it's the number of books that are piling up that have to be put back on the shelves, or maybe it's the grumbling on the part of the employees, or maybe it's the lack of space that you have, but any little red flag that you have that says "Something's not as good as it could be, something's wrong, I'm starting to get into trouble." That's not the problem -- that's only an indicator of the problem. If you go around treating those problem indicators all you're doing is treating the symptoms. The problem lies behind those indicators somewhere, and it's up to you to group, to analyze those indicators. You need to collect them and analyze them and find out what the problem is behind it, and then find out what the cause of the problem is.

Now as we're collecting these indicators we need a little data to make sure that we're seeing them correctly, and so we ask for some instances. Give us an instance of when the books were piling up, or when was the help complaining most. Write it down -- specific facts, dates, times, things like that. Be specific -- that's the hardest part of this system is writing down specifics, but it is critical that you do that throughout the whole process. Now you can speculate on the causes of those problems.

There are three parts to a problem. There is an indicator of the problem, which is the superficial stuff that you see; there is the problem itself, and then there is the cause behind the problem. Unless you can find out what the cause of the problem is, you don't have a chance to solve it. And we have found that causes of problems fall into three categories. The three categories are, 1) the lack of skill and knowledge on the part of the people involved -- in other words they <u>don't know how</u> to do something. That's not placing the blame on them; it may be placing the blame on us if we haven't trained them how to do it, but for one reason or another they do not know how to do it. Now lack of skill and knowledge is the only area that can be combatted efficiently through the use of further training.

Another cause of problems is the lack of motivation, or incentive, or the improper attitude: motivation, attitude, incentive problems. We often think that training is the best solution for those problems. In fact in industrial training, at least, I have run into many situations where people have shown up at my technical training programs for reasons which were strictly motivational. "Good old Harry is the only one in the department who hasn't been to a training program and maybe that will

straighten him out or make him feel better or whatever it is." So-and-so has been goofing off on the job and just doesn't seem to be putting the effort into everything. We'll send him away to a training program," something like that. That's a managerial cop out. That type of motivation will probably last about a week. Maybe a week and a half. If that kind of thing works well, why do all good car salesmen have to get together every Monday morning for a good pep talk, motivational type meeting? It doesn't last very long, that's why. That's a superficial type motivation. Question?

The question was, "Am I making a distinction between training and education?" Generally I do not like to make a distinction between training and education, because I think that many times the distinction is artificial, a way of distinguishing between industrial education and academic type education.

Generally speaking, motivationally caused problems are not solved by education or training. In other words, there is something more basic at the root of that problem which has to be looked at than just sending somebody away to a training program. Question back there.

Question: How do you find out what the problem is, by interviews?

Jim Sucy: Yes. Very often when you are looking at a problem, gathering data, evidence about the problem, etc., you will either have to interview the people, or to observe the people or interview somebody around the people in order to get that information. You may have to observe the products of their work, for instance, in order to analyze that.

From the floor: What I was getting at is do you involve the people in the problem analysis?

Jim Sucy: Yes. Involving the person in the design of the training is often the solution to the problem. So from that standpoint, whenever possible it is a good idea to do that. It isn't always possible, but sometimes it is. Question.

From the floor: I can't sit still and let you say that motivation and attitude are not amenable to educational change, that education cannot effect a change. Generally it's a matter of level. You say that motivation and attitudes are management problems.

Jim Sucy: Right.

From the floor: Then aren't you talking about management training needs?

Jim Sucy: That is true, but now we're talking about a different audience. Training may be one of the possible solutions. If I'm saying that problems that are caused largely by motivational, or attitudinal or incentive type causes, those are not usually cost effectively relieved through the use of training programs. That doesn't mean that that is not a possible solution or a possible part of a solution, but generally that again, is trying to treat the symptoms rather than getting at the cause. Why are they not motivated? Is it because of the working conditions? Is it because of their expectations? Is it because of the reward system that they have?

Let's get at the cause of it and try to remedy that rather than just shipping them off to a training program and then have them come right back to the same conditions that were causing the lack of motivation and so forth in the beginning. So, managers often use training as a cop-out rather than finding out "What's wrong in my department? What's wrong in my library?" That's what I'm saying. We have to look somewhere else rather than just training to solve that type of problem.

(Question from the floor)

Jim Sucy: Okay -- the question has to do with "How about the motivation force of extra knowledge, as far as the job is concerned?" And the answer is "That's part of job training. Having a person's skills, including the background information he needs to do the job, is part of the job training. And that should be written into the job description, the job title, and everything.

(Comment from the floor)

Jim Sucy: Yes. That's true. I agree with you that's part of motivation, but that may not be the problem that I'm talking about here. It may be something else. We certainly want to look at job knowledges and skills as being part of it.

Another question. "How about new employees during the indoctrination period, the orientation type program, are we not trying to get through motivation there?" Yes, orientation programs very often are partially informational and partially motivational.

We move along here, then to the third type of problems, which are environmental problems. So far we've talked about two causes -- people don't know how to do it, and the people don't want to do it. The third category is that they are being prevented from doing it. They may want to, they may know how, but there is something in the rules and regulations, there's something in the facilities blocking them or they don't have enough time to do it, they don't have the equipment to do it. There is something in their environment which is preventing them from doing it. Sending people away to a training program, or putting on an in-service training program or continuing education program for those people, will not solve that problem. You have to remove the environmental block. You have to give them the time, or the equipment, or the procedures and so forth to be able to do that type of thing.

One of these three causes, or a combination of these three causes, is behind every problem that we run across. You can almost always see these three causes standing out. So in this first worksheet we're only saying "Speculate on these causes." We'll test it later on, but speculate on it now. Because if it's a real clear cut speculation we may be able to short circuit the whole system and go directly to a managerial solution, rather than a training program.

At this point we write a problem statement, or a hypothesis, in this particular case something like "These people are not doing these things because of these reasons as evidenced by this data." Right? It may be 100% wrong when you start off, but it's a hypothesis that you can test.

(Comment from the floor)

I agree with you, it's nice to illustrate these questions, these situations with examples, and so at this time I'd like to digress and introduce an example that we can use for purposes of illustration. I'll select an example that is out of your field and out of my field, so that we don't tread on anyone's toes and hopefully you'll be able to correlate it with your own problems.

One safe area is in the area of driving, so let's say that we're an educational consultant, and a local businessman who runs the Lackluster School of Driving comes to us and says, "Gee, something must be wrong. I've been graduating people from my school and I thought I was doing a pretty good job, but lately I've had an indication that something might not be as good as it could be. I've been checking the accident records of my graduates and the figures indicate that they've been going up lately. The number of accidents per year by these students is increasing." So we say, "Well, okay, we'll look at your problem, we'll help to analyze your problem, maybe we can find out what it is."

We go through worksheet one and collect some data, and come up with a hypothesis based on that model that I mentioned, "These people are not doing these things because of these causes as evidenced by this data." Which substituted with the information that we have here reads "Graduates of the Lackluster School of Driving are having more accidents because they don't know how to drive through heavy traffic as evidenced by recent accident reports." Now that's a hypothesis, it may not be right. As a matter of fact, it's not exactly right. Further evidence will show that we have to refine it a bit. But that's a problem statement. We get it down on paper, get agreement or disagreement on that hypothesis, and test it.

We identify the people that are involved, who they are, what the deficiency is, we list some deficient products, and we list deficient performances.

Now, translated into your terms deficient products would be books filed in the wrong place, or cards mixed up, or reports wrong. I don't know what kind of deficient products you might run into, but a product is a tangible evidence of somebody not performing correctly. On the other hand the next line down, deficient performance does not have a tangible piece of hard copy or something like that to go with it, but which is like the clerk out on the front desk who has a slightly surly attitude toward the people that come into the library. Performance is a transitional thing and must be observed in order to record it, but products are something you can collect and study after the fact. We're really asking the same question, two ways to make sure that we get it right.

How many are deficient? Where are they located? What percentage are deficient? Are they all located in the same building or spread out all over the state, or the nation? What previous training have they had? And if there is more than one audience, let's make sure that we design our program for one audience first and then modify it for other people after that. The worst thing that can happen to a training program is to be halfway developed and everybody says "Gee, that's a great program, but we ought to give it to this group, and we ought to make it adaptable to that group, too," and the first thing you know you've watered down the intent of the original program to the point that it's not good for any of them. You have to identify your primary audience.

Well, we do a little more study of the data in the case of the driving school example, and we find out that it isn't so much that these accidents occurred in heavy traffic, but that they occurred around intersections with stoplights. Okay. A little more data there. So we start to go back and look at the training program to see what is taught about intersections where there are stoplights. How have people been trained to handle that type of a situation?

We identify resource people, project leaders, analysis developers, subject matter specialists, experienced performers, decision makers, master performers, we list sources of information, like other job descriptions or definitions of the tasks involved, and who we can use to test any changes in the program. In our particular case now we are able to identify John Smythe here, who's gotten to be a pretty good driver, he's gotten through a million miles without having an accident. So somehow he's doing something right that a lot of other people aren't doing. Maybe if we studied John Smythe here, we'd be able to figure out what he's doing right and build that into our training program. For almost every training program there is a master performer somewhere out there, and if you can study that individual and find out what they're doing right and build that into the training program, you will build the level of all those other people up closer to the master performer. Now some new jobs have no master performer available and you have to make up mastery performance out of your head. For a new technology that will not arrive until next year, there are obviously no master performers yet. You have to create mastery performance on paper and test it.

Define the project scope. All we're talking about there is "What are the goals of the program? When the whole thing is over what do you

want these people to be able to do? What are the limitations of the program?" It's just as important to list what the program is not expected to do as it is to list what it is expected to do. More people get into problems because their supervisor believes that a program is going to do everything for everybody, when in fact it was never intended to do that.

Define the measures of success. How will we know if we're successful when we're all done? Are there other people interested in this program? We developed this program for our library system, are other library systems around the country going to be able to use it? That makes a decision as to how we schedule it, how we budget it, and so forth.

Identify the practical constraints with which you have to work. How much time do you have? How much money do you have? How many resource people do you have? Note any red flags that you have. You're developing this program and you know that the administrator up the line is against it. That's a red flag you have to recognize right from the beginning. The two people that you've got involved in working on the program hate each other's guts and are going to be fighting all the time. Okay. You have to know that ahead of time and plan your strategy around that red flag. That's a bookkeeping type of thing. Defining the measure of success is very seldom done as far as training programs are concerned. In our role as consultant to the president of this driving school we might be able to tell him, "Gee, if we make changes in your program and are successful, we anticipate that at the end of the year we will be able to bring the number of accidents down to this acceptable amount. If we do that, then you pay us the full amount. If we don't do that, then

we'll prorate our budget so that if we only reduce accidents half as much as we say, we will collect half as much money from you." Contingency management is a scary area that a lot of people don't like, but it is a way of negotiating with people for performance. You get paid on your performance. That scares a lot of people because it lays it on the line.

Mastery performance, job definition. This is the heart of any training program, or should be. How are you going to train people to do a job if you don't know specifically what the job is? And I mean specifically. Doing a task analysis is taking that job and breaking it down into individual tasks. A task is the smallest unit of work that has a product associated with it. The product doesn't always have to be tangible. Answering a telephone is a task associated with a job. The product is a satisfied caller. The criteria for doing it is to be able to take the information, or to provide the information, and to do it courteously, and do it efficiently, and all the other criteria that you want to put on that type of a task.

Most of the jobs we analyze, especially professional jobs, have about 150 individual tasks associated with them. These can be all kinds of things from the various types of the paper work that you have to go through, to the supervisory tasks, the budgetary tasks, and the management tasks. All of those items have to be identified. Once you have done it for a particular job you are pretty well set, because most jobs don't change very rapidly. Maybe updating it once a year is sufficient for you, once you do it. You have to take a couple of days to write a good task analysis.

We use worksheet no. 4 here, for doing that analysis which essentially says "Here's the job title, here are the general areas, like managerial, or supervisory requirements, and bookkeeping requirements, budgetary requirements." You can break any job down into three or five major components, and then you take those components and you break down the tasks one at a time. For instance, there is one task that I have to do every week on my job, which you probably wouldn't even think about putting in here, but I want to use it as an illustration. I have to make out a time card at the end of the week. Does anybody else have to make out a time card? Right. If you make out a time card that's a task you have to do. If they fire me and put somebody else in my place, that person is going to have to make out a time card. That's part of the job. It's so menial that we often don't think of it, but when you stop and think of it, many of the things that we do day in and day out are almost at that level of menial little things that have to be done. We hardly even think about them, and yet they occupy a great deal of our time. So I would put down under the column saying "Task," "Complete time card." And in the next column it says "Product or accomplishment of doing that task." Well, the answer is obviously "A completed time card." In that particular case it's a very easy one to put down. In the next column we say, "List the minimum acceptable criteria for doing that task." In other words, how will I know if I'm doing it right or wrong? Or, how will you know whether I'm doing it right or wrong? What's the minimum acceptable criteria for signing or completing a time card? Well, from experience: I must sign it in ink, I must sign it on the bottom line, I must fill in any exceptions to a 40 hour week, and I must turn it in by

10:00 on Friday morning. If I am not doing one of those things, then I am not meeting minimum acceptable criteria for that task. So now I know exactly what I have to do as far as signing a time card is concerned. The next column says "What are the most common errors in performing this task?" Now, this is a clue to the educator or to the person designing the programs that these are the things you are going to have to emphasize in your training program. The most common errors are the things you emphasize to eliminate them. Well, from experience, the most common error in this example is forgetting to turn the card in by 10:00 on Friday morning. Unless someone is really bugging me, I tend to forget that type of thing. So I put in there, "Forget to turn in by 10:00 on Friday morning."

Next column says "What are the tools, equipment and materials needed for doing this task?" This question is to identify any environmental blocks. What supplies do people need to do this task? We've taken on programs and when we got to that point where we had to fill in the tools, equipment and materials needed; all of a sudden it became obvious that the reason people were not doing it was that they didn't have the right tools, or equipment, or materials. It may be something as innocuous as a poorly designed order form, or a report form, or something similar. Why train people to make them to use an order form that's obsolete? Solve the problem by changing the order form!

Finally, "Is this task being performed correctly?" If it is, that's as far as you have to go with that task. Because if everybody is performing that task correctly, don't go wasting time on training programs, or writing objectives and skills for that program. Concentrate

on the things they aren't doing correctly. Now that's worksheet no. 4: Task Analysis, A Job Definition. That's the heart of any good training program. As I say it generally takes 150 to 200 tasks to completely define any professional job.

(Comment from the floor)

Jim Sucy: Question was, whether or not it takes two days to do a task analysis, and if so how many people and so on? I would say probably two man days of people who are qualified would do it. Using a brainstorming technique with planning boards and cards and so forth, I can get 90% of those tasks with 3 or 4 people who know the job in 20 minutes. The rest of the time is spent in getting the other 10% and defining the criteria. But that's a group type situation -- if you can get 4 or 5 people together, who know the job, you can get most of those tasks identified very quickly. The rest of the time is just spent filling in the other blanks, which go quite easily, for people that know the job.

Generally the cognitive tasks have to evidence themselves in some type of action and those can be defined as such. Many of the least visible types of things that we do, the thought process things are only important as they evidence themselves in our decision making or our actions. We're taking a look at those decision making activities and then at the skills and knowledges that make those correct decisions. These are part of the prerequisites required for people to learn to make decisions or take action. All that background information that we need to know about the decision making will be listed in the prerequisites, in the training

function, in the learning function. So we do have to address ourselves to those things. It's just that we address ourselves to them in a different way, in a different place. So we're talking about more obvious tasks now.

Very briefly let me again say that we take a look at all these tasks that we have identified, we cross out all the ones that everybody is doing correctly, because we don't have to treat those. What's left we take a look at from the standpoint of "Are they not doing it because they don't know how?" If that is obviously the answer, then those are the things we put into our training program.

"Are they not doing it because they don't want to do it?" We test all those things to find out what are the motivational, attitudinal, or incentive causes behind those things. "Are they not doing those tasks because they are being blocked from doing them because of something in their environment, the rules and regulations, the equipment, the space, the time, the facilities, whatever it is, some environmental block?" What we do is to separate out those two things, analyze them, gather data, and maybe even make a recommendation to management saying "Look, you don't need a training program for this problem. You've got to get your own house in order. These people have got to have new typewriters, or these people have got to have more shelf space, or whatever." Environmental blocks. Those are the easiest to identify; those are the easiest to remedy, providing, of course, you have the money, and time, and approval to take care of them.

The motivational, attitudinal, and incentive caused are the hardest to take care of because they get down to emotions of the person. How

do you motivate somebody? Every individual has a different set of reinforcers. You have to know what those reinforcers are; you have to know what turns people on, if you're going to motivate them. Money is probably one of our least effective forms of motivation, because it occurs too infrequently. We can't give raises when we'd like to give raises, and we very seldom can give them in the amounts that we'd want. Usually we have rules and regulations which restrict our use of money as a motivator. So we have to turn to other types of reinforcement. Recognition is one of the better ones and one of the least expensive forms of reinforcement. But there are many reinforcers on a personal basis, that work very effectively to let the employee know when they are doing a good job. A little of the behavioral sciences and reinforcement theory helps out in practice.

I won't dwell on that particular area, but essentially the philosophy is that we go through all those skills and knowledges, go through all of those tasks, separate out the skills and knowledges ones, which are obviously part of the training program, look at the motivational, attitudinal, and incentive, know that we may have to treat those when we come into the skills and knowledges area, but primarily we have to look for the causes and remedy those causes, and look for the environmental blocks and get rid of those. We take a look at the overall cost of what it might be, the cost of the problem, to find out whether our solution is going to cost more than the problem does. What is it costing us to have people foul up the records every month, or get behind on the work? What does it cost us to have people in our library with a poor attitude? What does that cost us in terms of the success of our program?

As far as training is concerned then, we have eliminated from our list of tasks everything which is being done proficiently, everything which is not being done because of motivational problems and everything which is not being done because of environmental blocks. This leaves those tasks which are not being done because people don't know how to do them as part of our program. From those, we write objectives for our training program. If we did a good job on worksheet no. 4, we have our objectives practically written, because we've got the task, the product, and the criteria all down on worksheet no. 4. It's just a matter of saying that "as a result of this program these people will be able to do these things to this level of performance criteria." Just a rewording of this information gives us our objectives, in plain, concise, measurable terms. We don't have a lot of the junk that is put into objectives when we sit down and write them off the top of our heads. We don't miss some of the objectives as we would if we didn't go through a task analysis. So by writing your objectives based on job definition -- tasks -- you avoid all the problems that you ordinarily get into by writing objectives from any other base.

Now again, you write these objectives, and there may be some subobjectives to some of these. Here you indicate any prerequisites. In other words, in order to be able to do this task it requires a prerequisite of -- an understanding of mathematics, or the ability to do simple addition and subtraction, or the understanding of a foreign language, or Latin suffixes, for examples. Prerequisites are introduced at this point, because they are the level of learning that people have to be at in order to be introduced to doing a particular task.

We also take a look at the learning that's required, because many times we don't have to train people to a very high level of learning in some of these tasks. We can break it down into the superficial level of learning, which is the "talk about." That's often an orientation program. Give me about an hour and I'll be able to make you conversant in almost any subject that you choose. At least you'll be able to go to a cocktail party and talk to people and sound like you're intelligent. That only takes about an hour, however, and your level of knowledge is not very deep. If you want to have more background knowledge, to understand the principles behind those things, it's going to take a little longer, and a different kind of a training program. Not an orientation program, but something with some conceptual meat to it, so that you can understand some basics. But if you want to be able to do something, you have to have an opportunity for hands-on learning practices. You can't read a book on how to make an automobile and go out and make an automobile. You can't read a book on how to make a movie and go out and make a movie. You've got to do it; you've got to have some practice, some hands-on practice. That's the level of learning that we're talking about.

Different people require different levels of learning even in the same subject area. An administrator has to know many things at a general level. A supervisor has to understand the reasons behind some of those things that are done, and a technician has to be able to do them. Make sure you aim your programs at the right level of learning for the right people. Sometimes we get into the problem of finding a good training program and then giving it to everybody. Generally, for all but one of those audiences, it's a misfit. Too much information for some and not enough information for other.

Let me read the objective, overall goal really, of our program as stated here:

> Upon graduation the student will drive any type of automobile through any type of traffic situation, observing all signs, lights and rules as outlined in the state rule book, without having any self-caused accidents of any type for five years.

Now that's a pretty broad objective; it's more of a goal for the improvement of our training program than an objective, but a specific objective for any one of those tasks can be written in that same format.

Lastly on this sheet we make a decision to teach to recall, or to guide. Right here let me say that many times we make people take training programs for information which they do not need to know, and which they will forget before they get around to using it. Memorizing large numbers of items rather than providing them with a guide to doing it at the time they have to do it. Even in our automobile situation we have some guides. An example of a guide in our driving example might be this: You can teach people how to react from memory, such as how to handle an accident situation such as being able to swerve or stop; or you can provide them with a guide (if they have enough time to read it) such as how to shift the automobile. Most of the little sports cars today have a "guide" on the steering column or knob, so that even if you've never driven that automobile before you can get in it and you know that "1" means first, and "R" means reverse, and you can "guide" your way through it. Too often we do not take advantage of guides. In fact, I can visualize many examples in a library where guides could be used very effectively.

I have trouble with the Dewey decimal system in trying to find books in the right place in the library; I'd be a grand subject for a good guide to how to get to this area or that area. How to operate equipment. How to use this microfiche viewer, for instance, could be very well guided. Companies like Eastman Kodak could do more about putting guides right on to the machine. When all else fails you read the instructions. Instruction books are nice, but they get lost. I like visual guides better than word guides. But I'm for building them right into the machine, right where you need them, so they never get lost. I'm not just telling you that, I'm preaching it back at Kodak, too. But we could use more guides, and it would cut down on our training time and the cost of training immensely. Why train people to do something that they're going to do once or twice a year and forget between times? Why train people to do something that is so complex that the number of steps or the sequence of steps are going to get all fouled up in the meantime? Why risk training people to do something that is so critical to property, life or safety. Those things should be relegated to guides. In other situations, for example emergencies, you don't have time to find your guide and read it, you've got to be able to react instinctively. There are some conceptual tasks that cannot be guided very efficiently and must be learned to recall. But we don't take advantage of guides nearly as much as we could. A good guide, a really well written guide, is a very valuable thing. A Heath kit guide on how to build a color television set, even though you hardly know what a screwdriver is, is an excellent example of a guide. An example of a poor guide is some of the Japanese instructions on how to assemble a toy that came out right after World War II. We see more examples of poor guides than we do of good guides.

Scheduling development tasks is one of those housekeeping duties where you try to lay things out and plan it so that you don't run out of time or money or people before the program is completed. It's budgeting and scheduling and where you start to predict "What media am I going to use?" "What's the structure of the program going to be?" You start to project. You plan target dates, and you might use a very simple PERT chart to tell you how much time you've got left and what the critical steps are going to be. That gets rid of that complacent feeling six months before the program's due that you've got all the time in the world to work on it, and then the last three weeks you go into a crisis stage, working double time. PERT charts -- they let you know if you're slipping behind and what you can do to catch up. There's a good self-instructional book on PERT charts for managers, by the way -- I think Argyll is the company that puts it out. Anyone can learn how to do those PERT charts in about two hours time by reading that little book.

Describing behavior further is probably where I'll conclude this morning because I want to show you some interesting things in that particular area.

Task level mastery (performance mastery at the task level) is a very valuable thing from a managerial standpoint. It tells you when you're hiring people what they're going to have to do; it tells you in training people what is required. In evaluating people it tells the criteria and in letting the people themselves know what's expected of them. But from a training standpoint you have to analyze performance at least one step level below that. If you're going to write a guide you have to take each task that has to be guided, and you go through it step by step,

writing the steps to accomplish that task. You do a step level analysis. If your step level analysis is good, that becomes your guide, along with a few things like "Caution: Do not stick finger into socket," or whatever. You can test your guide by giving it to someone who has never done that task before and if they can do it without hesitation or without failure, you've got a good guide. That's the best way to test a guide.

Does that mean we don't have to do a task analysis if we're not doing a guide? No. If you're going to lecture about how to do something, or if you're going to demonstrate how to do it, or if you're going to write a self-instructional program on how to do it, or if you're going to let the people do hands-on how to do it, you still have to define, step by step, how to perform that task. So you have to do a step analysis for each of those tasks that are part of the training program, where learning has to be brought to the "do" level.

Now, once in a while we run into a little problem when we try to analyze performance. Sometimes we have difficulty writing a step level analysis, and we say "Something's wrong. Our concept of doing this task must be faulty or imperfect." How do we get at that type of thing? We go one step further and write a stimulus response chain -- a prescription. It's really a prescription of a learning problem. And we go through that process step by step and we say "What do we do first? What do we think, and what do we do?"

Now let's get back to our example of the driving school to demonstrate the value of writing a "prescription" of behavior. For example, describe the stimulus-response steps when you approach a stoplight and the light is red. You take your foot off the gas and you put it on the brake, right?

We can describe in stimulus response terms exactly what you do from the time you perceive that red light until the time you've stopped. If the light is green, what do you do? Keep your foot on the gas and you continue on through the intersection. Now, what do you do if the light is yellow? There's where you get into problems. This example that we've outlined on the slide for you here is an illustration of that. The state rule books usually say -- what? "Proceed with caution." Almost word for word. "Proceed with caution" is not enough instructional information to provide the learner in this situation. So we diagram it like this and we discover that in a fraction of a second you have to make up your mind what to do. You're going to act like it's a red light or you're going to act like it's a green light. You have to consider a lot of things. It's a very complex discrimination that you have to make, very complex. Such things as "Is the road wet or is it dry? Am I going fast or am I going slow? How far was it to the intersection when I noticed the yellow light? Am I close to it or far away from it? Is there a car right in front of me, or not? Is there a car right in back of me or not? Is there a police car on the other corner over there? Is it light or is it dark?" In group discussions we've come up with at least 20 different factors that have to be considered in that fraction of a second that you have to decide whether to put your foot on the brake or to put it on the accelerator. Now that's a complex discrimination, and telling people to read the state guide book and proceed with caution is not the proper solution to the problem.

Once in a while by isolating a performance task like this we can determine exactly what the problem is: a large, multiple

discrimination in this case. We can train people in a learning experience, how to identify those factors, and how to take each one of them into consideration, so they will be much better skilled at making that kind of a decision. Whenever you have a learning problem that seems unsolvable, breaking it down to the prescription level (stimulus/response chains) is a good way to find out where the problem is. You'll probably find a big hole in there that you haven't even been addressing in your training. We've done this many times. If you follow the library process from beginning to end you will probably find many areas that have been overlooked in defining them from the standpoint of training. You assume that people know them, but that's a false assumption in many cases. So these are good diagrams to try when you get into a real sticky training problem.

Now that's the end of the analysis process. We've broken the whole thing down to the final level of detail. When you're down to stimulus response chains you're really down to the ultimate in detail. You don't often have to go that far, but if you do, there it is.

Now, how do we get back up into a training program. Well, I'm just about out of time, but let me just remind you that all of those decisions that we've been making along the line -- the level of learning, which skills to teach, which ones not to teach, the prerequisites that have to be taught, guide versus non-guide -- all of these things have really been answering the questions for us that we must answer in defining our training program. We've been making the decisions really, as we've been analyzing the problem. The answer comes back fairly easily. We have to provide training programs that will give us hands-on work

for some, we have to provide prerequisites for others, these have to be taught only on the understanding level, and you can almost go through the worksheets and construct an outline at this point. Now you probably notice that I have not said one single word about "You ought to make a movie, or you ought to make a slide program, or you ought to publish a self-instructional book," because from our standpoint we don't want to make that kind of a decision until we get to this point. That should not be an overriding consideration until you get past this stage of analyzing the learning problems.

I mention three learning problems here on the last slide. First, the learning problems of <u>discrimination</u>, of being able to tell things apart that look very similar. There are rules of thumb on how to treat discrimination learning problems. Second, there are <u>sequence</u> learning problems, doing things in steps. We have rules of thumb on how to design training programs to take care of sequence learning problems. Third, there are <u>generalization</u> learning problems -- how do you apply rules to a lot of different situations? -- and we have rules of thumb for teaching generalization learning problems. Those are spelled out in various behavioral science learning textbooks. We also use the "mathetics" design for self-instructional designs as being far more effective than the linear programmed instruction that I did earlier. Tom Gilbreth's <u>Mathetics</u> is a good book to look at as far as this approach is concerned. Demonstrate, prompt, and release every unit of material. For motivational purposes, each lesson is preceeded with an overview and the consequences. "Today we're going to be talking about this material, and it's important that you pay attention because..." And if you can't

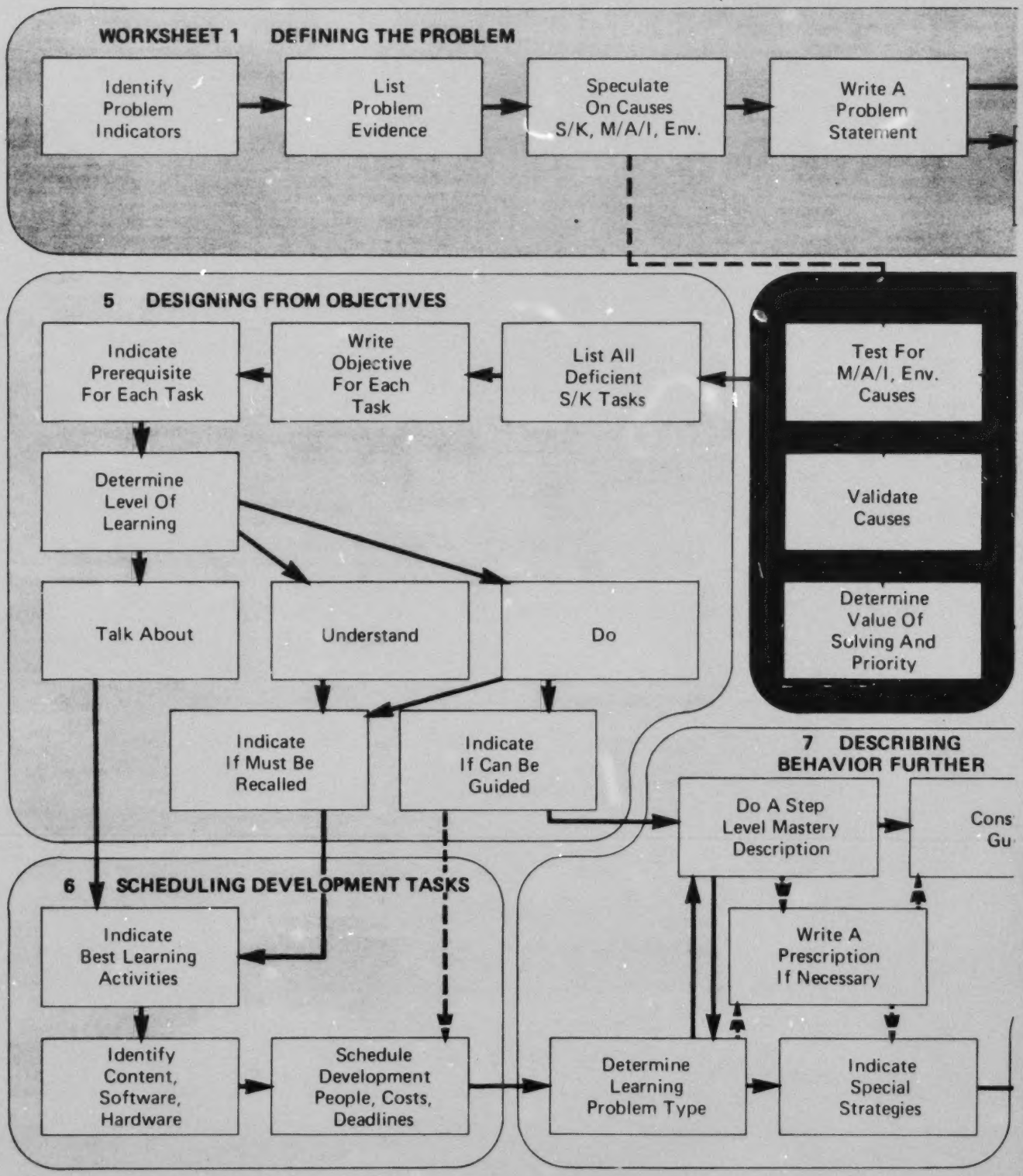
think of any reason why it is important that the learners pay attention, you'd better stop and think of whether it's worth teaching.

Do validation testing, and be careful that you don't load the audience with the wrong kind of people; they should be the same kind of learners you're going to wind up with in the final program. Now you start to produce the program, regardless of the media and methods that you use. By this time you probably find that you have a choice of media that you can use. And it doesn't really make a bit of difference whether you use a movie, or slides, or a self-instructional book, or whatever, you just adapt it to the kinds of learning problems that are designed. If you need motion, okay; if you need audio, okay; if you need hands-on, okay. It's right there for you. So we have all of these types of training programs -- hands-on, conceptual, seminar, self-instructional, workbooks, tapes, movies, demonstration or discovery approaches, or whatever.

And lastly you evaluate the program, and here's where I said you've got to be careful. Don't be satisfied with just saying -- "If people go away liking the program that's nice." Attitude is only one factor. The validity of your program is another. Did it do what it was supposed to do? Was it effective? Did it do all of those things it was supposed to do, and did it do it efficiently? Was it effective for the right audience? What were the costs of the program? Was it worthwhile? What was the value of the program? Weigh the value versus the costs. You'd probably cancel half of your programs if you did that. And finally, recommend revisions.

Well, I'm over my time, and I think we can have the lights back up. Thank you very much.

PERFORMANCE ANALYSIS A

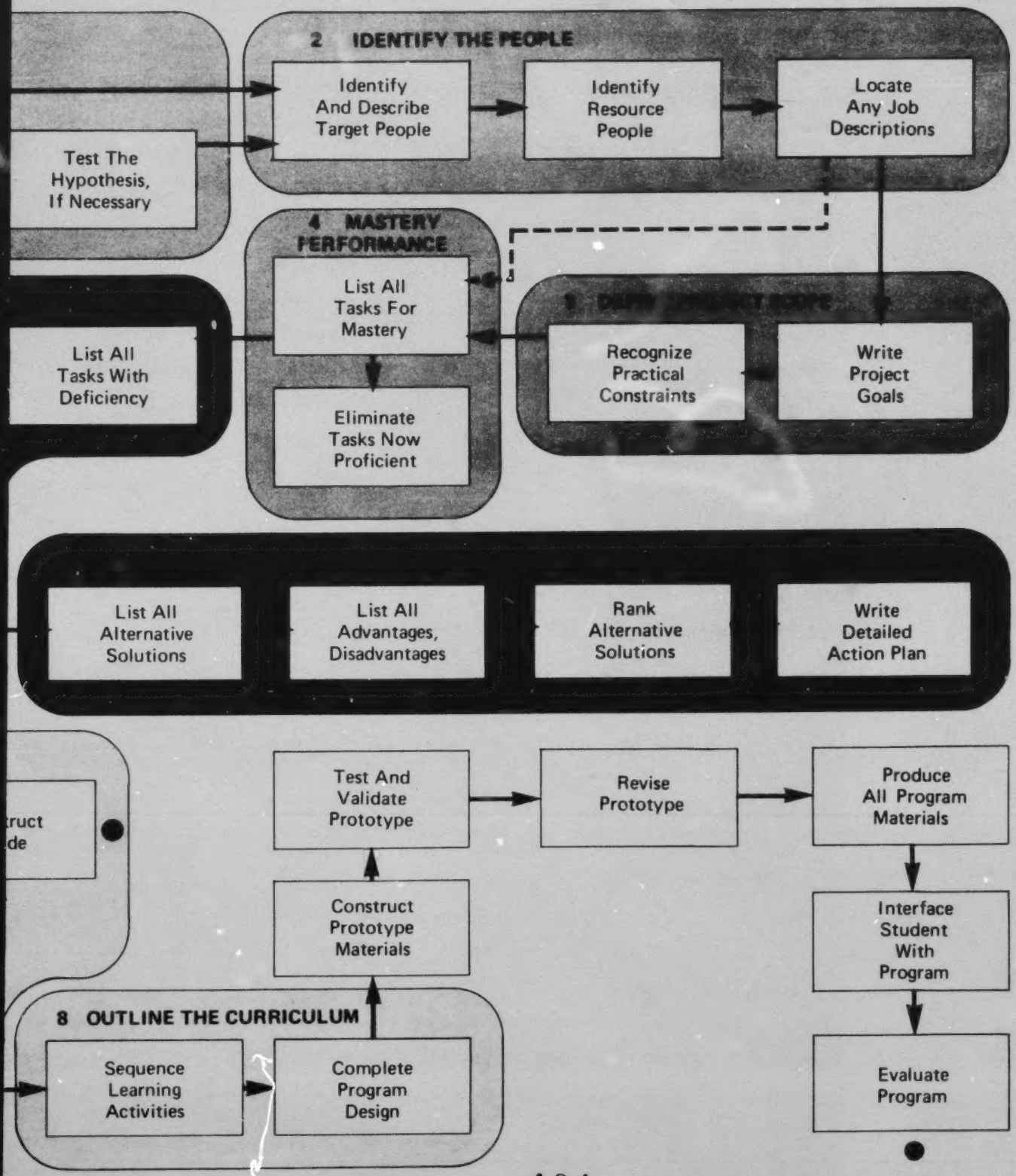

WORKSHEET 1 DEFINING THE PROBLEM
Identify Problem Indicators
List Problem Evidence
Speculate On Causes S/K, M/A/I, Env.
Write A Problem Statement
5 DESIGNING FROM OBJECTIVES
Indicate Prerequisite For Each Task
Write Objective For Each Task
List All Deficient S/K Tasks
Test For M/A/I, Env. Causes
Validate Causes
Determine Value Of Solving And Priority
Determine Level Of Learning
Talk About
Understand
Do
Indicate If Must Be Recalled
Indicate If Can Be Guided
7 DESCRIBING BEHAVIOR FURTHER
Do A Step Level Mastery Description
Cons Gu
6 SCHEDULING DEVELOPMENT TASKS
Indicate Best Learning Activities
Write A Prescription If Necessary
Identify Content, Software, Hardware
Schedule Development People, Costs, Deadlines
Determine Learning Problem Type
Indicate Special Strategies

© EASTMAN KODAK COMPANY 1974

5/74

1063-02-01

ND INSTRUCTIONAL DESIGN



DEFINE THE PROBLEM

Name _____ Date _____

1. **Check any indicators (symptoms) that relate to this problem.**

- ☐ New performance for experienced people
- ☐ New people
- ☐ Low productivity
- ☐ Low quality
- ○ No rewards
- ○ Poor attitudes
- ○ Poor service
- ○ Low incentives
- ○ Conflicting motivation
- ○ Negative motivation
- ☐ New technology
- ☐ New skill
- ☐ Low or lacking in skill
- ☐ New knowledge
- ☐ Low or lacking in knowledge
- ☐ New responsibilities
- ☐ New equipment (or facilities)
- △ Problem with existing equipment
- △ Takes too much time
- △ Not enough time available
- △ New management
- △ No two-way communication
- △ Standards not known (or defined)
- △ New policy (or standard)
- △ Conflicting standard (or policy)
- △ Ineffective management
- △ Economic (or cost) problem
- ☐ Other

2. **List some specific examples of the problem indicators checked above.**

_____

_____

_____

_____

_____

3. **What might be causing this problem?**

☐ a. People don't know how to do their job (lack skill or knowledge). Who are they?

_____

○ b. People don't want to do something (lack of motivation, incentive, attitude). Who are they?

_____

△ c. People are prevented from doing something (environmental block). Who is prevented?

_____

What is the block? _____

©EASTMAN KODAK COMPANY, 1974

WORKSHEET 1

Project _____

4. List evidence to support the cause or causes of this problem as answered in Question 3. Consider facts, documented examples, records, poor or defective products.

_____

_____

_____

_____

5. Write a problem statement (as you see it) using the preceding information.
MODEL: These people are not doing these things because of these reasons as evidenced by this data.

_____

_____

_____

_____

_____

6. How sure are you of this problem statement?

☐ Need to check ☐ Enough to proceed ☐ Absolute

7. If you were asked to check the accuracy and completeness of this problem statement, how would you do it? Think in terms of how someone else could test this problem statement.

_____

_____

_____

_____

_____

8. Possible remedy to problem:

☐ Training (if you checked "a" in Question 3)

○ Incentive program or motivational development (if you checked "b" in Question 3)

△ Change in work area, or equipment, or schedules, etc (if you checked "c" in Question 3)

☐ Combination of training and incentive (or motivation) development (if you checked "a" and "b" in Question 3)

11/74 0576-02-01

Skill/Knowledge

When students or employees do not perform correctly or do not produce products to criteria, they may or may not need instruction. As a rule, instruction solves skill/knowledge (S/K) problems. Other measures are needed for solving motivational/incentive (M/I) and environmental (ENV) problems.

Putting the "whys" of problems together is not simple, but for instruction to be effective and efficient, the correct analysis is vital. Below are some indicators of skill/knowledge problems.

Suspect a skill/knowledge cause when:

1. People are new to a task.
2. People have a background of generally low-level skills and knowledge (and there is no history of motivational/incentive problems).
3. People have had no formal training in the task.
4. A history of inadequate training capability in the organization is present.
5. Training has been massed rather than distributed.
6. Training did not include a chance to practice skills.
7. Training was paced to a group rather than the individual.
8. The deficient task is branched (alternate routes) rather than linear (straight-sequenced).
9. Decision making is involved in the task.
10. The task requires the application of general or operating principles.
11. People cannot perform correctly even though they know they are being observed (or know that their job depends on it).

These indicators are considered guidelines rather than rules.

Motivational/Incentive

Trainers and managers may think that instruction is the answer to all performance problems. Others lump most performance problems under the motivational/incentive category, "They could do it if they wanted to," etc. A rational trainer/manager must look at the problem causes with an open mind, considering all possibilities.

Motivational/incentive and environmental problems are often closely allied, and it can be argued that all motivational/incentive problems are caused by environmental problems. Nonetheless, motivational/incentive and environmental problems often require different solutions. Categorize them separately.

Suspect motivational/incentive cause when:

1. The deficient task is distasteful or socially negative.

2. People are unaware of the value of the products produced.

3. There is strong disagreement about the method that should be employed in performing the task.

4. The effort involved in performing the task is greater than the reward received.

5. Punishment is employed as a management (teaching) technique.

6. There is a history of documented motivational/incentive problems.

7. People do not get feedback on their work.

Again, these seven points are guides, not rules.

Environmental

Suspect environmental cause when:

1. There has been a history of:

   a. Deadlines not being met.
   b. Frequent management turnover.
   c. Greatly fluctuating profit and loss statements.
   d. Supply and demand difficulties.
   e. Duplication of effort.

2. There is no clear-cut chain of command or work flow.

3. People are forced to "wear many hats."

4. Grumbling is widespread.

5. People have no alternative tasks to do while waiting for the product or accomplishment of some other person.

6. There is the frequent appearance of people "not having anything to do."

7. Troubles with machines, lack of supplies, or unworkable schedules exist.

NOTE:

S/K The reason people usually do not know what to do, or how to do it, is because they lack the skill and knowledge to perform effectively.

M/I/A The reason people do not want to perform is because they lack appropriate motivation, or incentive, or attitude.

ENV The reason people are prevented from doing something is because the environment or organization will not let them perform.

What is Behavior?

Behavior can be learned, and it can be over or covert. Behavior occurs at several levels. We are interested in these three levels.

1. TASK: A group of steps "belonging to each other," that have a definite beginning and end.

2. STEP: A smaller component of the task. As stated, there are two kinds -- overt and covert.

2. RESPONSE: The smallest meaningful unit of behavior making up a step. There can be overt and covert responses.

In dealing with human behavior, we are interested in all three levels. The above classification is a MODEL. That is, it is intended to be used as a guide for thinking about the quantity of a given behavior.

For example:

One TASK might be: Making a cup of tea.

One STEP of that task might be: Turning the burner on.

One RESPONSE of that step might be: Removing the kettle (when the whistle sounds).

What is a Model?

As a rule, mastery description is equal to the performance and products of some "master." That is, it is often helpful in describing mastery to base the description on a real person who actually performs the behavior indicated in the problem area -- one who does not have the deficiency found. This person is called the "master" or the Experienced Performer. This "old pro's" behavior is the model that wee seek to diplicate through training, by removing environmental barriers, or by solving motivational/incentive deficiencies.

The model (or mastery) has these characteristics:

1. It has PERFORMANCE (oberservable or covert).

2. It produces OUTCOMES (or products).

3. The performance and outcomes meet certain CRITERIA (or standards).

The goal of describing mastery is: To produce a written description of the master's behavior and products in as much detail as required on which to base the analysis of the learning problems connected with replication. As stated, this level of detail varies according to the level of approximation of the analysis. Ultimately, the requirements of the analysis may present the need to describe mastery to the Nth approximation, Stimulus-Response or OPERANT.

What is a Task?

The term, like objective, really has no meaning except in context with other descriptions of behavior.

A TASK

A discrete unit of performance which has a definable beginning and end, is performed by one person, and results in a measurable product.

Levels of Behavior Analysis

TO DESCRIBE BEHAVIOR TO THE:	DO THIS	BY
AREA Level	Isolate the general performance situation that contains the causes of the deficient performance (problem).	Analyze problem symptoms ("problem indicators"), and define the performance problem AREA.
SUB AREA Level	Isolate more specific siutations that contain the causes of problems and form a basis for describing a general SOLUTION.	Find at least two performance statements that include all behaviors of the problem AREA.
TASK Level	Analyze the task, calculate the probable cost/effectiveness, write terminal objectives, make learning system design decisions, analyze the methods, prepare performance aids.	Analyze the problem indicators and ELIMINATE all performance that is not relevant to the problem.
STEP Level	Prepare performance aids, analyze the methods, analyze the task.	Break the tasks into smaller components.

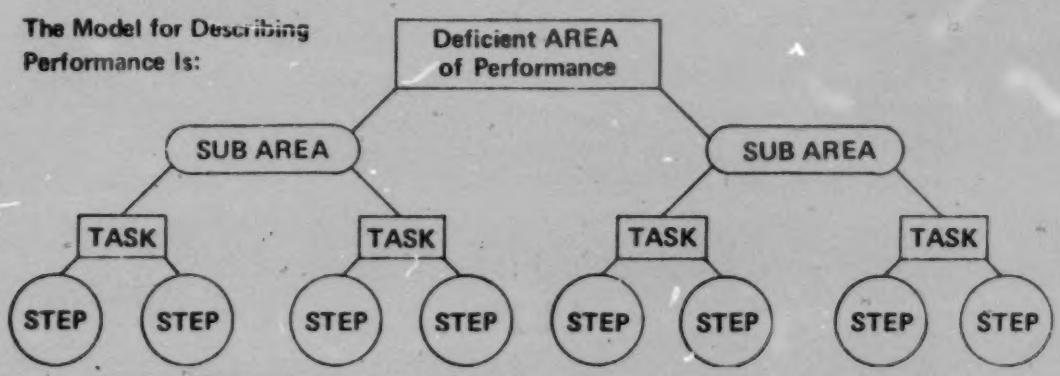
Why Describe Error-Free Behavior (Task)?

Description of behavior means that we must describe ERROR-FREE performance to form the basis for objectives. The reason for this is that we define "performance problem" as:

HOW THE ACTUAL PERFORMANCE IS DIFFERENT FROM THE MODEL PERFORMANCE.
EXPRESSED: M-A=D.
Model, minus actual, equals deficiency.

M-A=D is read: "Deficiencies (D) are found by comparing Actual performances (A) to some model of Mastery performance (M).

The Model for Describing Performance Is:



MASTERY PERFORMANCE

Analyst's name _____ Subject matter specialist's name

Experienced performer's name _____ Date _____ P

1. Job title? _____

2. Areas of interest within job? _____

3. List specific performance tasks within each area.	4. For each performance task, list its product or accomplishment.	5. What is the minimum quality criteria acceptable for each performance task?

111

© EASTMAN KODAK COMPANY, 1974

ect _____

WORKSHEET 4

6. What are the common or frequent errors when people perform this task?	7. What tools, materials, equipment, or information are needed to do this task correctly?	8. Are people presently performing this task well?
	112	

11/74 0576-02-04

PROCEEDINGS
of the
Second CLENE Assembly, July 17, 1976

Second Session at the Palmer House, Chicago

Travis Tyer: Welcome to our rap up session and reporting session for the small discussion groups which were held yesterday. As we announced yesterday morning, two of the twelve workshops did not materialize, and in reality, since several people didn't show up at one of the others we only had nine in the afternoon, so we only have nine reports this morning.

The idea behind the concurrent sessions is to let those people explore various expressed interests in somewhat of an informal manner, where they can have an opportunity to exchange ideas. In reality last night when we all got together we found that there had been a wide range of techniques used, and that a great deal had happened in many of those workshops.

We're going to try to make this as easy to listen to as possible, and highlight the most important things that came out of the discussion groups. I've asked the reporters to speak to two points: "What were the highlights of the small discussions as the participants reacted to the presentations?" and secondly, "What were the implications for CLENE from the content as it was presented?"

For Group I, the reporter is David King, Librarian of the Editorial Library for the Standard Education Corporation, here in Chicago.

Small Group Discussion
Group 1

PRINCIPLES OF ADULT EDUCATION THAT SHOULD BE ADHERED TO IN CONTINUING EDUCATION PROGRAMMING

Workshop Leader: Charles E. Kozoll, Associate Director
Office of Continuing Education and Public Service, University of Illinois, Champaign, Illinois

Workshop Recorder: David E. King, Librarian,
Editorial Library, Standard Educational Corp.
Chicago, Illinois

The afternoon and evening sessions of this workshop were conducted differently; the first beginning with a discussion of principles of adult learning and applying them to the problems presented in two case studies, and the second beginning with the case studies and deriving statements of principle from the discussion of them. This report combines information from both sessions.

In an adult learning setting it is important that the person conducting the learning experience establish and maintain a climate of respect between him/herself and the participants. The use of appropriate terminology, such as "group leader, resource person, speaker, or facilitator" rather than "teacher, or instructor," and "learners, participants, conferees," or other terms rather than "students or pupils" will reduce the undesirable connotations involved with a teacher-to-student, superior-to-inferior attitude and will help to create this climate of mutual respect among peers.

The nature of adult learners is different from that of children and planning for an educational event for adults should include the following considerations:

-- Adult learners tend to be self-directed rather than dependent. Casting them into a dependent role turns them off.

-- Adults bring an extraordinary amount of experience, in both diversity and volume, to an educational program. This experience can be and should be exploited to the group's advantage.

-- A continuing education leader must recognize when a group or "target audience" exhibits a readiness to learn -- a phenomonon known in education-ese as "the teachable moment" -- and provide the setting and opportunity for appropriate experiences.

-- Adults come to continuing education programs with an outcome orientation; that is, they expect upon completion of the activity to have received useable information which can take the form of a practical skill, some new understanding, or just plain entertainment.

Bearing in mind these concepts regarding adults as learners, the groups discussed the basic elements of the program development process. Five topics were identified and a check list of some useful matters to consider during planning was developed for each aspect.

-- <u>Needs Assessment.</u>

What is the ideal performance? Need for a competency model.

Where are people right now, honestly rather than ideally?

Be learner- rather than facilitator-centered. Do librarians scare people because they tend to be helpful, service-oriented teachers?

Importance of multiple sources of data. Supervisor vs. staff perceptions. Input from schools, municipal offices, churches, etc.

-- Advisory Committee Responsibility

Composition of group. Representative? Large enough?

Get advice, not planning, steering, etc.

Make the duties of members of the committee clear.

How much and how will you keep them advised and informed?

Built-in reward/acknowledgment system (dinner, reception, letter of thanks, etc.)

-- Design of Learning Experience.

Quality and specificity of objective is key to success.

Pace.

Level.

Amount and type of interaction you want to receive.

Degree to which you can complement and draw out their own experience.

-- Marketing of Services.

Image of sponsoring organization with client group is important. Will it turn people off?

Is your offering unique? Competitive with another?

Title should be explicit and non-offensive.

What does promotion promise as the outcome?

Potential audiences are 1/3 favorably disposed toward programs, 1/3 negative, and 1/3 neutral. Problem is to appeal to and reach the 1/3 neutral.

-- Ongoing and End of Program Evaluation.

Evaluate as you plan and make modifications as soon as possible.
Determine how much data it is really necessary to collect.

Who is the evaluation for? Supervisor? Lecturer? Yourself?

How will data be collected?

How will data be validated?

How will data be reported?

Two case studies were offered to participants upon which to base discussion of principles of adult education programming in context. Copies are attached to this report.

A topic suggested as being suitable for more in-depth analysis at a future CLENE Assembly was the psychology of adult learning. In both sessions there was discussion of differences and possible similarities in the ways children learn and are taught, and how adults learn best and can be taught most effectively. Several participants who had studied psychology in teachers colleges recognized that what they learned about teaching children and young adults is not necessarily appropriate in situations involving adult learners. The discussion of this topic would probably include principles of pedagogy (which we all understand) and andragogy (which we need to understand more fully).

Case I (Used with Discussion Group I)

Henry Stimson is the head librarian at an old and established branch in a once deteriorating section of Johnson City. The building had been constructed during the 1930's as part of a federally funded WPA-type project. During the post-war years in the 1950's, it was a very active center in the neighborhood, because there were so many families with young children attending elementary and secondary school. Ties with the community had been very great during that fifteen-year period.

In the early 1960's, however, the composition of the neighborhood began to change. The one-time elementary and secondary students had grown and left for jobs in other parts of the city, state, and nation. Their parents had reached retirement age and decided to sell off many of the large homes that were no longer fully occupied. The income level in the neighborhood dropped. Until the early 1970's, it appeared to many that the neighborhood would be very much like those in other cities, rapidly and continually going downhill.

A series of developments in areas close to the library began to change the neighborhood for the better in the early 1970's. Many of the older homes and stores were razed and new construction started. Several of the buildings were apartment-shop complexes, specifically designed for older citizens. Rapid transit was revived in the area, allowing those in the neighborhood easy access to cultural, recreational and medical facilities, by riding just one bus. Some once deteriorating pocket parks began to get more local attention.

Henry came to the library as its head about 3 years ago. One of the things he noticed was the number of older people who had come to the library to read periodicals, check out books, or just be in a place where there was definitely human activity, and comradeship. During the course of any one year, the library would offer a half a dozen programs of general interest for the public, but had not gotten involved with programs for senior citizens.

Knowing the large number who came to the library and being aware of how many lived in the immediate vicinity, Henry is interested in developing a comprehensive approach to programming for this group. He has just an interest now and a few untested ideas, and would like to proceed further. As a colleague of Henry's, what would you suggest be his plan of action using the steps in program development discussed earlier in this session?

Outline, in a series of steps, what Henry could do to move forward, firmly but carefully.

Case II (Used with Discussion Group I)

The usually calm community of Fox Run has been alarmingly disrupted because of recent events, some of which are out of their control. The large metropolitan area which the community adjoins has started to make noises about annexation and municipal government. Many citizens of Fox Run think they are just looking for additional tax money; but another substantial portion of the community thinks that there is some merit in annexation, especially through obtaining better fire and police protection than they currently have.

The local public school system and community college have remained relatively silent on the issue. Further than that, they have refused requests from several local citizen groups to take the leadership in discussion of advantages and disadvantages of annexation versus local government.

The League of Women Voters, the Chamber of Commerce, and a number of influential local citizens have approached the director of the Fox Run free library, Alice Henderson, to see if the library would take some leadership in organizing such a program. This would be the first instance that the library had ever served as the focal point for any controversial issue under discussion. Quite obviously, Alice Henderson is worried about what will happen if she agrees and if she disagrees. She calls you, as a close friend in a distant city, for advice. Mrs. Henderson is asking two basic questions: should the library agree to conduct a program; and if it agrees to do so, what should it define as the steps to making sure that this becomes a successful issue-oriented endeavor.

Small Group Discussion
Group 2

NEEDS ASSESSMENT TECHNIQUES USED FOR A CONTINUING EDUCATION PROGRAM IN STAFF DEVELOPMENT

Workshop Leader: Barbara Conroy, Educational Consultant
Tabernash, Colorado

Workshop Reporter: Ruth Donovan, Assistant Director of Libraries,
University of Nevada

Barbara Conroy discussed a variety of techniques used in a year-long institute on training and staff development which was sponsored jointly by WICHE and USOE. Techniques for needs assessment used in this institute included:

1. Use of detailed application form for the Institute
2. A mini-workshop on needs of participants
3. An evaluation form used well into the Institute
4. An Institute advisory team of four participants which continuously monitored needs
5. A Delphi survey
6. One-to-one personal interviews with participants

The final report of this Institute and a clear indication of the Institute's success includes a compilation of 21 models of needs assessment tools developed and used by participants. This document is Staff Development Model Book: Program Design for Library Personnel, which is available for $2.50 from WICHE publications.

Group discussions re-emphasized the very basic role of needs assessment. Group members shared experiences and concerns. The main ideas discussed were:

1. The difference between staff development and continuing education
2. The effect of atmosphere and trust level on a successful needs assessment program
3. The value of using models and techniques tested in other fields
4. The necessity of following a needs assessment program with a training program
5. The importance of marketing educational products and allowing lots of lead time for workshops, etc.

The group discussed the implications for CLENE and felt that CLENE could respond to a very obvious need for how-to-do-it information on needs assessment. CLENE could help to develop skills needed to analyze expressed needs and to translate these needs into training programs, and CLENE could develop and disseminate the model instruments to be used for needs assessment.

Some question was raised about the implication of CLENE setting national standards and guidelines. Participants felt that CLENE could do more useful things.

Small Group Discussion
Group 3

DESIGNING EVALUATION PLANS FOR TRAINING : A PRACTICAL APPROACH

Workshop Leader: Brooke Sheldon, Doctoral Student
University of Pittsburgh
Graduate School of Library & Information Science

Workshop Recorder: Bridget L. Lamont, Consultant
Library Development Group
Illinois State Library

Thank you, Travis.

I had the pleasure of working with Brooke Sheldon, and our group, which met twice yesterday, discussed designing evaluation plans for training. We concentrated on a somewhat practical approach. We used basically the same format with both groups though we had a very diverse size -- the first time around we had 5 participants and the second time we had 16 participants. But we decided to try it with both groups and felt that it worked very well.

We began each group discussion with a very nominal group structure where we did some brainstorming and asked each participant to comment on the criteria that they felt were important in evaluating staff development training programs. We then got into some basic discussion and comment on terminology and Brooke presented a lot of different ideas based on ideas and remarks from Malcolm Knowles' remarks at Midwinter and Ruth Warncke's new publication. We talked about evaluation itself, both external as well as internal evaluation, but very much on the necessity

of relating the evaluation to the objectives you were using for your program, the realities you must face, in using and being ready to modify your program as you go along, and as you see things developing to realize that you can make changes. Finally, we talked about the crucial meaning of having participant involvement all the way during the planning of the training program.

We then got into a case study of an actual program which had been funded, and we used role-playing with groups looking as this program, which was a staff development program. We looked at the objectives, and then after a 20 minute to a half an hour discussion, developed what we thought would be the criteria for evaluating this program. I believe that we will include that case study in the proceedings and will also list the different types of criteria in evaluation measurement that we came up with.

In the evening's session, I wanted to mention that we had a lively, to say the least, discussion on a variety of terms -- "competency," "skills," "theoretical ideas versus practical applications," and this type of thing, and this would lead us to one of the recommendations that we would like to offer for future workshops of CLENE. We feel that there is a need to have a wide open discussion of the terms that were discussed at this particular workshop. A lot of people had a lot of different ideas on what the terms "competency-based," "theory versus application," and "skills," and how these related to each other.

We also have another recommendation that we would like to offer. We concentrated more on the criteria for evaluating the program, but there was a lot

of interest in the techniques of evaluation, and we thought that this would also make a useful discussion next time around.

Small Group Discussion
Group 5

A MODEL PROGRAM OF CONTINUING EDUCATION AND STAFF DEVELOPMENT FOR ACADEMIC LIBRARIANS

Workshop Leader: Dale Carrison, Director of Libraries,
Mankato State College, Mankato, Minnesota

Workshop Recorder: Neal Kaske, Associate Librarian, Doe Library
Library Systems Office,
University of California at Berkeley

Our group used a modeling technique in which we attempted to list objectives and activities which would bring about these objectives. The methodology used to get the ideas out was brainstorming, and this was done in six areas, as far as our strategy was put forth. This was in the area of continuing education and staff development in academic libraries, attempting to build a model program.

The first thing we brainstormed on was positive aspects of continuing education and staff development within the academic library setup. The second thing was negative aspects. The third, ideas; the fourth, objectives -- what did we want to accomplish. The fifth: What activities would it take? And the sixth, the model program. Unfortunately, numbers 5 and 6, activities and the model program were not completed. We actually went over a half hour of our time, and I would like to now simply relate some of the highlights of these particular items for your own information.

Some of the positive aspects were:

1. Harmony between personal and organizational goals
2. Personal growth
3. Define career ladders and opportunities
4. Maximize the potential of the individual and the organization
5. Organizational mobility
6. Programs based on user (patron) needs and a feeling of self-worth and competency

Some of the negative aspects were misinformation about opportunites as the result of continuing education or staff development, in other words, false expectations about what would result, the lack of measurable results of the program, too much emphasis on staff development, and not enough emphasis on what the library was really supposed to be about.

Some of the ideas were the necessity for commitment on all levels of the organization, involvement of the total staff, an incentive or rewards system, the opportunity for individuals to use the new knowledge, manpower planning and the maintenance of a skills inventory of employees, and also the mainentance of a needs assessment of the organization itself. Some other ideas were holding hearings on the programs as they were being developed, and also to use a system of personal interviews with interested individuals about the program.

Some of the objectives that we came up with were to achieve and sustain commitment on all levels by all employees, to improve in our personal understanding, to improve one's understanding of one's role and function within an organization.

Also to improve the effectiveness and efficiency of the organization, which seems to be a little general but a pretty good objective. Another one was to utilize both formal and informal communications systems. To provide for personal and organizational incentive systems was also set forth, which was somewhat interesting if we had gotten around to the activities which would have brought about an organizational incentive program. We also had to develop our staff development programs around organizational goals which were in harmony with them. These are just a very few of the four areas which we did manage to cover.

The implications for CLENE were that since we didn't get to the model, that one should be developed. We've got four out of six steps completed for it, plus we also noted from what other groups were doing that the chances are that there is a model out there, or several models out there, so without re-inventing the wheel, we felt that CLENE should concentrate in this area and come up with a model for both a staff development program and a continuing education program for libraries -- for academic libraries as well as any other kind of libraries. Obviously we'd want them -- them being us -- to see what models are available that other people have produced. From this morning I might add that Jim Sucy's talk would definitely provide us with a well organized and very rigorous outline for a training module to use within the staff development program.

Travis Tyer: Thank you, Neal. I was hoping he was going to say one thing he said to me last night. He said one thing he realized, and I think when you fill out your

evaluation form you might want to think about this and let us know your reactions. He indicated that he didn't think that this, having the academic librarians, or the public librarians, pulled off into one of the discussion groups, was as productive as it was when there was a general mix of people, just by pec.le rather than by type of library. I'd be interested in hearing your reaction to that idea on the evaluation forms you are going to write up, a little special note to me.

Small Group Discussion
Group 6

NON-TRADITIONAL EDUCATIONAL TECHNIQUES

Workshop Leader: Robert Brown, Assistant Director
Graduate School of Library Science
University of Illinois

Workshop Recorder: Charlotte Mugnier, Associate Professor
Graduate School of Library Science
University of Alabama

Information to be imparted can be enhanced and made more effective by using different teaching techniques from those that have been traditionally employed in graduate library education. This was the premise of the working group on non-traditional education.

One successful non-traditional technique is "simulation" or "gaming" where a real life situation is simulated, requiring the student, either as an individual or as a team member, to develop a strategy for the solution of a problem. The technique is one of participatory involvement rather than passive or spectator-type learning such as reading or lecture. It requires a) pre-knowledge of the situation, b) practice in the form of gaming and c) retrospective analysis of the process.

Robert Brown introduced two simulation/involvement exercises that he uses with students at the Graduate School of Library Science at the University of Illinois and in workshops involving library administrators and trustees. The first is one that he developed: "Josetta," is an imaginary public library given character through a file of documents which include the characteristics of the community it serves. The library is described in organization charts, personnel records, annual reports,

board meeting minutes, policies, etc. Finally, there is a series of "in-basket" problems, day-to-day operational problems (for example, personnel requests that challenge established policy and public relations problems of an unusual nature) that are to be solved by students in the context of the Josetta situation.

The second model is one produced by the U.S. Department of Labor, "Settle or Strike," which draws heavily on role-playing as a teaching device. Participants study their roles, the background of a labor relations controversy, the terminology of labor negotiation, selected contract clauses and the "crisis situation." A deadline is set for problem solution, in this case, the onset of the strike. After the session, students transfer what they have learned to a library context.

The strengths of simulation as a teaching/learning technique are: 1) It is effective for all types of participants. 2) Administrators are removed from temptation to personalize. 3) The student can project into an administrative role. 4) It is an enjoyable way to learn. 5) There is more retention. 6) It demonstrates commonality in problem solution.

Requirements for success are these: 1) It is essential that the participants enter prepared; certain background knowledge is needed. 2) An analysis of the process must follow; it reinforces what has been learned. 3) The physical environment during the exercise is important; to be effective there must be saturation or total immersion in the situation. 4) Simulation should not be overused; it loses its effectiveness as a technique.

The workgroup felt that CLENE should: 1) Identify, collect, evaluate, and make available, appropriate, successful simulation models. 2) Offer at coming assemblies the opportunity for teachers and administrators to participate in selected gaming sessions. 3) Develop an annotated bibliography of reading and films on the subject.

Small Group Discussion
Group 7

DEVELOPMENT OF INSTRUCTIONAL MODULES SELF-CONTAINED LEARNING PACKAGES

Workshop Leader: Donald P. Ely, Director, Center for the Study of Information and Education, Syracuse, New York

Workshop Recorder: Blanche Woolls, Director of School Library Certification Program, Graduate School of Library and Information Science, University of Pittsburgh

Objectives: At the end of this presentation, each participant will be able:

1. To describe an instructional module;
2. To prepare a first draft of a module using the recommended guidelines; and
3. To describe the process for field testing a module.

Why modules for competencies?

Competencies are usually expressed as discrete skills which lend themselves to self-instructional procedures. Competencies are usually composed of tasks which are easily formulated as objectives. Objectives are the starting point for designing instructional modules. The specificity of competencies permits development of modules in which objectives can be easily assessed.

The context of instructional development

There is a movement in higher education today known as instructional

development. Instructional development is a process for systematically reviewing all of the variables which impinge upon the teaching/learning process with a view to configuring them in such a manner as to help improve that process. While instructional development procedures vary from institution to institution, they do have certain elements in common: (1) emphasis is on the learner; (2) the design is for individualization; (3) the process of teaching and learning is systematically organized to improve efficiency while helping to optimize learning; and (4) help is provided -- staff, media, and dollar resources to get the job done.

The process of instructional development can be implemented in a variety of ways. Syracuse University uses a basic design from which many modules, units, courses and curricula have been redesigned. This is one scheme; there are others. No one is "best" for all situations.

1. The project is selected by analyzing academic priorities.
2. Basic design inputs are developed through consideration of the domain of knowledge, student aptitudes, community needs and institutional priorities.
3. Various operation "givens" and constraints help to develop the basic design: facilities, time, objectives, staff, students, resources, and research.

Once these areas have been considered, each part of the design must be implemented according to the following plan:

4. Determine objectives
5. Selection of internal design format
6. Evaluate and select existing materials

7. Design and field test new materials

8. Logistical considerations

9. Implementation, evaluation, and revision

It looks like a difficult job -- and it is. It's far beyond the scope of our institute to do it. But it does provide a context for our efforts.

We will be emphasizing the "implementation" phase with special focus on designing and field testing new materials. We call them instructional modules. We must assume that you have gone through all of the preliminary steps even though that is unlikely. The important thing to remember is that the total instructional development process is necessary to bring about significant changes. Our development of modules is a micro-effort, but nevertheless a useful first step and prototype for further activities.

What is a module?

A module is ... an organized collection of learning experiences (usually self-instructional in form) assembled to achieve a specified group of selected objectives; generally conceived of constituting several minutes to several hours of instruction.

A module is the smallest element of a unit; several units usually comprise a course; several courses (and related experiences) make up a curriculum.

Modules have certain characteristics:

1. The content involves a single idea or concept; it is a segment of a larger unit. It is self-standing.

2. The single concept is related to other concepts which, when combined, form a "unit" or a "course."

3. It has objectives which can be attained and evaluated; it is systematically designed.

4. The content is presented through reading, viewing, listening, doing, or combinations of all four modes.

5. It can vary in time required to complete it -- from five minutes to five hours; an average time is about one hour.

6. It usually demands active participation on the part of the learner: i.e., overt responses are required throughout the module. All instructional procedures are spelled out.

7. Evaluation of student learning is a necessary component, sometimes during the modules and always at the end. The learner is informed about the adequacy of his/her responses.

8. The module is almost always field tested with representative learners before actual use.

With the background of instructional development as a framework and the definition of instructional modules to serve as a vehicle for delivering the competency based instruction, let us proceed to the specific procedures for developing instructional modules. These principles and techniques have been derived from personal experiences in developing modules, from observing and assisting teachers of library and information science to develop modules and from three useful sources in the literature: Coplin (1975); Johnson and Johnson (1975) and Thiagarajan (1975; 1976).

PREPARING INSTRUCTIONAL MODULES

There are three major steps in the development of an instructional modules: (1) Preparation; (2) Production; and (3) Field Testing.

Preparation

1. Define a workable topic.

   Before preparing any kind of material, explicitly state the scope of your module for yourself and your learners. Be sure that it deals with a legitimate need by checking it against statements from different levels of consumers: students, teachers, administrators, and subject-matter specialists. The module proceeds to the more complex and expensive parts of the development process only when these consumer statements match the implied need for the module.

   Think small and reduce your expectations. You may have to begin at an elementary level and sacrifice the larger ideas.

2. Identify the potential user of the module.

   You need to ask yourself what prerequisite skills an individual must possess in order to begin and complete the module. If you have any doubts about the learner's motivation, you should describe the rationale for the module. A learner's perception of purpose is often spoken of as the problem of relevance. It is true that students may not know at their stage of development what is really relevant, but if they fail to perceive relevance, it will impede their learning. Introduce your

module with as many convincing reasons as you can think of for learning what is in the module. Students will also learn better with an overview, such as the list of objectives or a statement telling what the module is about.

3. Be sure that a module is an appropriate vehicle to meet the need and to reach your learners.

"Systematic identification of a high-priority need in the field is no guarantee that the recommended solution is a relevant one. As happens every day, different experts come up with diametrically opposed approaches to the same need. This relevance check-point tests the face validity of the suggested solution. But it does not stop there -- it proceeds to require some empirical evidence of the relationship between the need and the solution. Some aspects of final evaluation are thus advanced to the initial stages to prevent our ending up with an effective and efficient module which teaches an absolutely useless skill." (Thiagarajan, 1975).

Production

4. State clearly what the student can do when the module is completed.

Your objective should tell what the learner can do if s/he successfully completes the module. There is a simple scheme to help you develop all the important objectives which you care about. Objectives are often divided into three different categories:

cognitive objectives -- descriptions of things you might wish your learners to do which are intellectual in nature; affective objectives -- descriptions of attitudinal responses which you might hope your learners would display after instruction; and psychomotor skills objectives -- statements of manipulative or motor capabilities resulting from instruction.

5. Break down the objective into components.

This process is often called task analysis. Many objectives tend to require sub-objectives prior to attainment of the main objective. Think through all the steps which are necessary to reach your objective and write them down. Imagine that what you have been doing and know so well is going to be read for the first time by someone who knows nothing. Be as clear and explicit as possible.

6. Arrange the components in a sequence.

The sequence should allow the learner to make a series of short steps to reach the objective. Sequences can be based on different criteria:

simple to complex	problem to solution
concrete to abstract	obvious to unexpected
specifics to generalization	past to present

Begin your sequence with a "grabber." Pull the student in immediately with a great title, a personal inventory, or some device

which creates effect or involvement. Then begin your instructional sequence.

7. Write directions and questions for the post-test.

   Each test item should be closely related to each objective and sub-objective. You can write one or more test items for each objective and sub-objective. By determining at the beginning what you expect learners to do at the end, you can save a lot of grief and needless labor.

8. Prepare the script and select the appropriate media.

   At this point you really get down to work. You must decide upon the medium and format of your module. Most modules are prepared in print or have a print component. Sometimes a slide set and tape is accompanied by a manual or guidesheet. In almost every case, it is helpful to have printed instructions if only to get the learner started and to provide a roadmap for the work which is to follow. Some modules use materials which already exist, such as journal articles, filmstrips, audiorecordings, and videotape. If you are using materials which are already available, you will have to relate them to each objective and use only those portions which are directly related to your topic. There is a tendency on the part of college professors to tell all they know. Remember to keep it lean. Keep telling yourself that this is intended to be an introduction and not the definitive piece on the topic. Console yourself by using optional exercises to introduce

the student to greater levels of complexity. Present only the amount of input and kind of information needed to allow the learner to reach the objectives you have defined. Since the production of a module is the major thrust of your development effort, there are several corollaries which are helpful during this exercise:

a. Set abstract ideas in concrete illustrations. Abstract ideas will benefit from being presented in the context of "real" examples.

b. Capitalize on certainties. It is easier for you and the student if you try to tap the previous experience of the students and then go on to the new information.

c. Facilitate the mastery of skills. It is important that the student have one skill down before proceeding to the next. The learner should be required to perform at least one specific task to reinforce the skill before new material is introduced.

d. Keep the learner active. Build in appropriate response items. Design exercises so that there is a high probability of success at first; then increase the difficulty.

e. Provide feedback after each exercise. This information should help the learners to change inadequate responses and to know why a response is right or wrong.

9. Field test and revise your module.

We know that all instruction is imperfect. We need to try out what we

have developed to see how well it achieves what it set out to do. If the learner does not learn what was intended in a module, the module can be revised so as to increase the likelihood that other students will be more successful. The purpose of field testing is (1) to determine clarity of the material; (2) to discover its interest; (3) to determine the appropriateness of the format; and (4) to discover the extent of learning. Let's consider each element:

a. Is it clear?

-- Is the language geared to the intended learner?

-- Are instructions precise?

-- Is the material logical and sequential?

-- Is there an appropriate amount of information?

b. Is it interesting?

-- Does it gain attention and hold attention?

-- Does it arouse curiosity?

-- Does it actively involve the learner?

c. Is it the most appropriate format?

-- Is it aesthetically pleasing?

-- Is it well-paced?

-- Is the learner comfortable with the medium?

d. Has learning occurred?

-- What is the level of accomplishment on the criterion test?

-- Is the criterion test too easy or too difficult?

-- What concept are unclear? (What causes confusion?)

The process of field testing for the purpose of revision goes through four steps: (1) expert appraisal; (2) individual tryouts; (3) group testing; and (4) total module testing. Let's look at each.

a. Expert appraisal involves subject-matter experts, media specialists, and experienced teachers of the subject and occurs as soon as the first draft of the instructional module is available. Each expert receives a copy of the module with the objectives and a description of the target population. Each expert reviews the module using appropriate checklists and/or other appraisal forms.

b. Individual tryouts are run with learners who represent the larger population as soon as an edited version of the module is available. There are two important things to remember at this point: You are testing the material not the student; It is the module and not you that is supposed to be teaching. During the tryout, answer any procedural questions but avoid all substantive ones. Refer learners back to the material. If the learner runs into difficulty, encourage him/her to think aloud. Probe for the probable causes of confusion. At the completion of the module, administer the criterion test. Once you have

your data, incorporate the changes in the revised module.

c. The next step of field testing is with groups of students in natural educational environments. This step is accomplished after the individual tryouts produce reliable results. You will want to be certain that all learners have the prerequisite skills and knowledge by administering an entry test. As they are going through the module, collect observational data on the students' use of the material as they work on their own. After students go through the module, administer the criterion test. As a result of this field test you may be ready to use the module with minor revisions. If, however, there are major errors or problems, you may have to revise and then go through another group tryout.

d. Final testing of the total module involves students, teachers, and independent evaluators. In this case you provide the teacher with an instructor's manual on the use of the manual. Permit the teachers to use the materials without any interference. During the process, you should observe the operation of the procedures and the actions of the learners and teachers. You should check the results of the students' work. After the use of the complete module, you should conduct a debriefing interview with the teacher and student representatives. On the basis of

this interview you may want to make suitable changes in the module and in the instructor's manual.

The process of field testing and revision is a necessary element of the total development of instructional modules. Without it, we can never be certain that our module accomplishes what it sets out to do.

This brief overview of module development provides some background, definitions and approaches to the process. The steps for production of modules should be used as guidelines -- not hard and fast rules. There is still much room for the "art" and intuitive dimension to blend with the science of learning. At this point, you can only learn by doing. There are no shortcuts. You must first of all be a content specialist in the subject area of your module. From this point on you may look at other modules to see how others have approached format and design. You may want to get further background information from such useful sources as Diamond, Johnson and Johnson, Kemp and the module by Ely and Hedberg. Use resource people on your faculty and from your institution. Involve professionals in the field. The next move is yours. Good luck!

SELECTED REFERENCES

Coplin, Merry. "Heuristics for Developing Learning Packages in the Social Sciences" Interchange, Vol. 3, No. 2, March, 1975.

Hedberg, John and Ely, Donald P. Preparing Instructional Modules (slide/tape) Syracuse, New York: Center for the Study of Information and Learning, 1975.

Johnson, Rita B. and Johnson, Stuart R. Toward Individualized Learning. Reading, Massachusetts: Addison-Wesley, 1975.

Thiagarajan, Sivasailam. "Relevance Check for Self-Instructional Packages" Audiovisual Instruction, November, 1975.

_____. "Learner Verification and Revision: What, Who, When, and How?" Audiovisual Instruction, January, 1976.

Small Group Discussion
Group 10

HOW TO PLAN AND CONDUCT CONTINUING EDUCATION WORKSHOPS AND INSTITUTES

Workshop Leader: Ruth Warncke, retired Deputy Executive Director, American Library Association

Workshop Reporter: Vida Stanton, Assistant Professor, University of Wisconsin-Milwaukee

In both workshop sessions a careful distinction was made between the definition of the terms "workshop" and "institute". Too often the words are used interchangeably and incorrectly. Specifically, workshops, as referred to here, focus on specific problems and should give participants an opportunity to practice certain skills with a "hands-on" experience. The discussion leader defined institutes as "short instructional programs set up for special groups interested in some specialized type of activity." In this Summer CLENE Assembly the workshop (term incorrectly used in this context!) sessions focused on "Institutes" as one method of continuing education.

The high priority put on needs assessment can not be emphasized too much in the total process of institute planning. Awareness of needs can come from many sources; a need can be perceived by someone who can do something about it, or by a person who may be an advocate for an idea, or by someone to whom the responsibility to assess needs has been delegated. Once the need has been established, the next step deals with the actual planning of the institute. Any shortcuts at this point may lead to serious problems later! It is very important

that in the makeup of the planning committee the group for whom the institute is planned be well represented, and that someone other than the director of the institute be chairperson of the committee. Committee members should be selected because they have something positive to contribute to the overall planning process. Some may have an expertise in the subject field, others may have had experience in organizing institutes, and still others may be representatives of the participant group.

After the committee has been established, the most important duty of the committee is to identify the objectives for the institute. The objectives must be stated in terms of what will happen to the participants. Other considerations which will have to be built into the plan at the time the objectives are established include defining the "target group," the evaluation method to be used, the plan for disseminating information generated by the institute, and any arrangement for a follow-up response from the participants.

Questions from the group prompted some very practical tips for planners from the discussion leader, namely: Allow enough time in planning so that all necessary arrangements can be made relating to facilities, speakers, materials for distribution or materials to be used in audio-visual presentations. Well-stated objectives give you a tool to work from; be as flexible as your objectives allow you to be. Usually objectives may be met in several different ways; be imaginative in the planning for meeting objectives, recognizing any constraints under which the planning must be done. Never take anything for granted in planning an institute;

Small Group Discussion
Group 10

HOW TO PLAN AND CONDUCT CONTINUING EDUCATION WORKSHOPS AND INSTITUTES

Workshop Leader: Ruth Warncke, retired Deputy Executive Director, American Library Association

Workshop Reporter: Vida Stanton, Assistant Professor, University of Wisconsin-Milwaukee

In both workshop sessions a careful distinction was made between the definition of the terms "workshop" and "institute". Too often the words are used interchangeably and incorrectly. Specifically, workshops, as referred to here, focus on specific problems and should give participants an opportunity to practice certain skills with a "hands-on" experience. The discussion leader defined institutes as "short instructional programs set up for special groups interested in some specialized type of activity." In this Summer CLENE Assembly the workshop (term incorrectly used in this context!) sessions focused on "Institutes" as one method of continuing education.

The high priority put on needs assessment can not be emphasized too much in the total process of institute planning. Awareness of needs can come from many sources; a need can be perceived by someone who can do something about it, or by a person who may be an advocate for an idea, or by someone to whom the responsibility to assess needs has been delegated. Once the need has been established, the next step deals with the actual planning of the institute. Any shortcuts at this point may lead to serious problems later! It is very important

that in the makeup of the planning committee the group for whom the institute is planned be well represented, and that someone other than the director of the institute be chairperson of the committee. Committee members should be selected because they have something positive to contribute to the overall planning process. Some may have an expertise in the subject field, others may have had experience in organizing institutes, and still others may be representatives of the participant group.

After the committee has been established, the most important duty of the committee is to identify the objectives for the institute. The objectives must be stated in terms of what will happen to the participants. Other considerations which will have to be built into the plan at the time the objectives are established include defining the "target group," the evaluation method to be used, the plan for disseminating information generated by the institute, and any arrangement for a follow-up response from the participants.

Questions from the group prompted some very practical tips for planners from the discussion leader, namely: Allow enough time in planning so that all necessary arrangements can be made relating to facilities, speakers, materials for distribution or materials to be used in audio-visual presentations. Well-stated objectives give you a tool to work from; be as flexible as your objectives allow you to be. Usually objectives may be met in several different ways; be imaginative in the planning for meeting objectives, recognizing any constraints under which the planning must be done. Never take anything for granted in planning an institute;

assuming too much can cause serious problems later. Be sure that participants are actively involved; involvement can take place in a variety of ways with talking being only one way.

Topics which emerged in the discussions which reflected the concern of many of the participants involved the financing of continuing education experiences and the recognition for participation in continuing education programs. The financial problem seemed especially crucial in relation to staff development in libraries. Several methods for recognition for participation in continuing education activities were mentioned including continuing education units (CEU's), released time and travel expenses. Both of these topics, although individualized when applied to a specific situation, could be a part of a CLENE sponsored program in the future.

The broad area of staff development seemed to have a high priority in the responsibilities of the participants. The need for programming through organizations and staff development seemed to encompass and go beyond the planning and producing of workshops and institutes.

Some of the questions raised indicated that there is a lack of knowledge and imagination for planning a variety of ways to achieve objectives. Too often, it seemed, the lecture was used when a more effective method of presentation might have been more successful and effective. A session in a future CLENE assembly on this topic would undoubtedly be well attended.

Some participants hoped that CLENE would participate actively in the notification of continuing education opportunities, not only those which were specifically library oriented, but also those programs in fringe areas which might interest librarians.

The need for continuing education programs and also the demand for persons responsible for the planning of programs were confirmed by the questions and comments of the participants. Ruth Warncke, author of the recently published Planning Library Workshops and Institutes, was an excellent choice for discussion leader for these sessions. Her interest and experience in the topic gave her an understanding of the concerns of those present as she provided encouragement to study and practice the art of conducting workshops and institutes.

assuming too much can cause serious problems later. Be sure that participants are actively involved; involvement can take place in a variety of ways with talking being only one way.

Topics which emerged in the discussions which reflected the concern of many of the participants involved the financing of continuing education experiences and the recognition for participation in continuing education programs. The financial problem seemed especially crucial in relation to staff development in libraries. Several methods for recognition for participation in continuing education activities were mentioned including continuing education units (CEU's), released time and travel expenses. Both of these topics, although individualized when applied to a specific situation, could be a part of a CLENE sponsored program in the future.

The broad area of staff development seemed to have a high priority in the responsibilities of the participants. The need for programming through organizations and staff development seemed to encompass and go beyond the planning and producing of workshops and institutes.

Some of the questions raised indicated that there is a lack of knowledge and imagination for planning a variety of ways to achieve objectives. Too often, it seemed, the lecture was used when a more effective method of presentation might have been more successful and effective. A session in a future CLENE assembly on this topic would undoubtedly be well attended.

Some participants hoped that CLENE would participate actively in the notification of continuing education opportunities, not only those which were specifically library oriented, but also those programs in fringe areas which might interest librarians.

The need for continuing education programs and also the demand for persons responsible for the planning of programs were confirmed by the questions and comments of the participants. Ruth Warncke, author of the recently published Planning Library Workshops and Institutes, was an excellent choice for discussion leader for these sessions. Her interest and experience in the topic gave her an understanding of the concerns of those present as she provided encouragement to study and practice the art of conducting workshops and institutes.

Small Group Discussion
Group 11

INITIATING A STATEWIDE PROGRAM FOR CONTINUING EDUCATION

Workshop Leaders: Travis Tyer, Senior Consultant Professional Development, Library Development Group, Illinois State Library

Kathleen Weibel, Doctoral Student, Library School, University of Wisconsin, Madison

Workshop Recorder: Joan Durrance, Instructor
Dept. of Library and Information Services
University of Toledo

Two very well attended sessions were devoted to this topic, with participants from throughout the United States, representing diverse continuing education elements, including library educators, public, academic and special libraries, state library agencies and associations. Two workshop leaders, Travis Tyer of the Illinois State Library and Kathleen Weibel of the University of Wisconsin Library School, presented the plans which these two states have developed to coordinate the continuing library education programs within each state.

Due to the unique circumstances in each state, the approaches to the development of the plans were different, but the elements which have emerged are similar. A continuing education needs assessment study was sought by the State Library of Illinois, but, since the funding was not forthcoming, it was necessary to bypass this needs assessment step, and form a committee to pool the knowledge of a diverse group of individuals within the library field.

The Illinois State Library Advisory Committee on Education and Training

was formed to develop a position paper and a coordinated plan for continuing library education in Illinois. The committee consists of 27 members, representing three major elements: 9 librarians, 9 public library trustees, and 9 library educators. The make-up of the three sub-committees of the Advisory Committee reflects various components of each element. The library education sub-committee, for example, consists of representatives of both accredited and non-accredited schools in Illinois as well as representatives of the two-year Illinois library training program. The Advisory Committee's Position Paper, included in these proceedings, outlines the goals of the coordinated program of continuing education for Illinois, which are, ultimately, to improve library service through better trained library personnel and through increased cooperation among libraries and other agencies and associations within communities.

Tyer discussed the Advisory Committee's examination of the roles of the various elements of continuing education in Illinois: library personnel, employing libraries, library systems, library associations, library education, and the state library. These elements, in order to work in a coordinated manner to deliver quality continuing education, require a linking agent, which, in Illinois, will be the State Library with the assistance of the Advisory Committee.

Kathleen Weibel detailed the development of a coordinated approach to continuing education which is being developed in Wisconsin. Wisconsin's planning in this area has grown from recommendations of the Final Report of the Task Force on Library to the Council on Library Development (June 1975). The Task

Force had been a representative group of all types of libraries, all library and media associations, and library education programs in the state. Weibel identified the elements involved in continuing education in Wisconsin to the CLENE workshop participants. Although most were similar to those which had been identified in Illinois, because continuing education in each state has developed differently, the configuration within Wisconsin was slightly different. For example, the University of Wisconsin Extension has for some years been active in continuing education programming. It is logical, therefore, that UW Extension play a prominent role in the development of a coordinated program of continuing library education in Wisconsin.

Weibel detailed the charge of the Continuing Education Planning and Coordinating Project, to be housed in UW Extension, with which she will be working. Steps in the development of the coordinated plan were detailed. Priority activities will be a needs assessment, and establishment of communication with and between all the elements of continuing education in the state through newsletter, telephone and direct contact with these elements. Later, cooperative planning will be initiated, probably, as recommended by the Task Force Report, through the state Division of Library Services, as the various elements have been identified, and the continuing education needs of library personnel have been prioritized.

The discussion which followed the formal presentations indicated that other states, notably Michigan, had begun the process of identifying the elements

in continuing education needs through increased communication. The discussion reinforced the information from the formal presentation that states have developed differently, but as plans emerge, similar continuing education elements are identified. The strengths of the various elements will determine the pattern of development of coordinated continuing library education which emerges in each state.

Group discussion focused on the need to understand and utilize the existing power and organizational structures within each state, and the necessity to evaluate the leadership and capability of the various continuing education components. A need for the development of guidelines for statewide continuing education programs was identified. The need to examine alternative continuing education funding options was pointed out. The role of certification in continuing education planning was suggested as a future consideration. The major focus of the discussion throughout, however, was on the similarities of emerging plans which focus on the interfacing of the various groups involved in continuing education.

One tool for increased communication discussed briefly in the first session, and in greater detail in the second, by Professor Muriel Fuller of University of Wisconsin Extension,was the Educational Telephone Network (ETN) which operates throughout Wisconsin. ETN is a telephone network operated through UW Extension which connects 200 stations in the state -- usually in court houses, campuses, libraries, and hospitals throughout the state. Each ETN station consists of a speaker and a set of microphones. All stations are

in simultaneous communication with each other, and may even communicate with an out-of-state speaker, reached through a long distance telephone call. ETN has been used extensively in Wisconsin for continuing professional education by a number of professions. Its potential as a continuing education and communication tool is great. An information brochure on ETN may be obtained at no cost through UW Extension. A new extensive publication, The Status of the Telephone in Education, has recently been released by UW Extension, and is available at a cost of $15.00.

Accompanying Documents

1. Illinois State Library Advisory Committee on Education and Training - Position Paper.

2. Continuing Library Education Planning and Coordination Project. Summary. University of Wisconsin-Extension, Madison, WI.

3. Hoffman, David R., "Report of the Task Force on Library Manpower and Education, Summary and Recommendations." Wisconsin Library Bulletin, Nov.-Dec. 1975, pp. 307-314.

4. Park, Lorne. "ETN ... A Way not to Travel."

MICHAEL J. HOWLETT
Secretary of State

OFFICE OF THE SECRETARY OF STATE
Springfield, Illinois 62756
ILLINOIS STATE LIBRARY

TO: Participants, 1976 CLENE Assembly

FROM: Travis E. Tyer, Senior Consultant
Professional Development
Illinois State Library

DATE: June 14, 1976

SUBJECT: Illinois State Library Advisory Committee on Education and Training - Position Paper

---

Attached is a copy of the position paper on continuing education for persons working in and with Illinois libraries.

This position paper (4th Draft) was developed over one and a half years with the advice of the Illinois State Library's Advisory Committee on Education and Training. A fact sheet on the operation and composition of the advisory committee is attached.

I would like to reinforce the fact that this is a position paper, not a plan. The advisory committee will concern itself with future months on the planning and methodology of best "activating" the position paper. We also recognize that the position paper may be constantly and continuously revised.

The position paper will be submitted in September to the Illinois State Library Advisory Committee for its endorsement.

BLL/TET/caf

Illinois State Library

ADVISORY COMMITTEE ON EDUCATION AND TRAINING

PROPOSED STATEMENT OF POLICY ON CONTINUING EDUCATION

"Continuing Education is essential for all library personnel, professional and supportive, whether they remain within a position category or are preparing to move into a higher one. Continuing education opportunities include both formal and informal learning situations, and need not be limited to library subjects or the offerings of library schools." [1]

I. PREFACE

The Illinois State library is firmly committed to a leadership role in developing a program of continuing education for the state's library community. The ultimate goal is:

"The assured provision of excellent library service for all the residents of the state so that the need for cultural, educational, informational, and recreational resources can be met, and the governmental and economic development of the state can be fostered." [2]

Improved service for library users is the end result of continuing education for people who work in and with libraries. All programs and activities should be planned and executed to enhance methods of fulfilling user needs. To accomplish this, all people who work in and with libraries will have to be included in a continuing education program. Hereafter, the term "those who work in and for libraries" is defined as all personnel employed in libraries, library board members, volunteers, Friends of the Library, academic and educational administrators, faculty members, company officials and boards, etc.

Specifically, the program is:

"To provide well trained personnel in sufficient numbers to meet the service needs of local libraries, library systems, and the Illinois State Library, and to provide opportunities for the continuing education and development of personnel working in and with libraries." [3]

I. PHILOSOPHICAL BASIS

The largest single expenditure of libraries is for personnel. The individuals who work in and with libraries assume the responsibility for interpreting society's informational needs and providing ways to meet those needs. It is therefore essential that these individuals are provided with the opportunity to maintain and improve their competencies.

Continuing education is a means for accomplishing this mandate. Though not an end in itself, continuing education is a means to maximize the efforts of the library's most expensive resource----persons involved in providing library services.

The program of continuing education shall have five goals:

1. To enable individuals working in and with libraries to respond to the constantly changing needs of the community.

2. To encourage individuals working in and with libraries to update and expand their competency in and knowledge of new technologies and developments.

3. To upgrade library service at all levels in all types and sizes of libraries.

4. To aid the total library community to define its objectives for interlibrary cooperation and extension of services to unserved and/or poorly-served clienteles.

5. To encourage libraries to become more closely aligned and involved with other agencies, associations and organizations within the total community.

Continuing education is life-long learning and development. No single agency, association, organization or group of people has exclusive responsibility as the primary supplier of continuing education. Rather it is a shared responsibility with all acting in consort to provide a coordinated, united program for those who work in and with libraries in Illinois. The role of the Illinois State Library is that of a catalytic agent coordinating activities in conjunction and cooperation with all other individuals, institutions, agencies and association involved with continuing education for the library community.

1. Groups must select the responsibilities they wish to shoulder and assume and negotiate their areas of responsibility.

2. Each group involved has its own relationship to the individuals who participate in its program; its own capabilities, its own motivations; and its own view regarding its role.

3. Roles may shift and change as a coordinated program envolves and developes, necessitating a continuous reassessment of roles, activities and needs by all participating groups.

4. Harmonious, united and efficient dynamics dedicated to the goals and purposes above lead to an effective total program.

III. AREAS OF RESPONSIBILITY

The large number of agencies, institutions and associations already involved in delivering continuing education to the library community in Illinois makes it necessary to define the role of the Illinois State Library within the total framework of the library environment in Illinois.

The structure includes these elements:

A. The Individuals Working in and with Libraries

1. Accept the concept of life-long education in which the learning process is continuous and unbroken.

2. Accept basic responsibility for continued self-development.

3. Assess personal needs for self-development.

4. Determine personal goals, objectives and strategies for continuing education.

5. Choose access routes for achievement of personal growth and development.

6. Supply the internal energy and drive for personal development goals.

7. Commit personal time and/or money to continuing education.

8. Evaluate continuing education programs.

9. Commit time and energy to the encouragement of and production of continuing education.

10. Assist, encourage and advance continuing education for those supervised.

11. Become involved in inter-professional continuing education planning in communities.

12. Support library association continuing education activity through membership and active participation.

B. The Employing Libraries

1. Consider continuing education an integral function of the organization in upgrading and developing service programs for clients.

2. Provide an environment conducive to the development of staff members to their fullest possible potential.

3. Acquaint library users with the fact that continuing education for those who work in and for libraries contributes to better service for users.

4. Identify continuing education needs as an outgrowth of long-range planning for the benefit of library users.

5. Establish policies and procedures that stimulate individuals working in and with libraries to take advantage of opportunities for personal development.

6. Provide financial support for the operation of a staff development program, including released time, merit increases, tuition reimbursement plans, travel expenses, etc.

7. Prepare learning packages for local use as well as for sharing and exchange.

8. Operate an in-house program of staff development for all levels of personnel employed in or associated with the library.

9. Institute a record keeping system for continuing education activities, using employment records, staff evaluation, continuing education opportunities in priority order, etc.

10. Co-sponsor continuing education activities with other groups.

11. Provide evaluation of existing opportunities for continuing education.

12. Support continuing education activities of library associations through institutional membership and active participation.

C. The Library Systems

1. Identify continuing education needs for the library community within the system.

2. Fulfill the continuing education responsibility as the employing library for the system staff and board members.

3. Establish policies and procedures that stimulate individuals working in and with libraries to participate in opportunities for personal development.

4. Assign staff to be responsible for continuing education activities.

5. Offer consulting help to local library units to develop and implement continuing education programs.

6. Demonstrate to local library units a procedure to follow to establish and produce a continuing library program.

7. Establish an incentive plan to encourage those who work in or with libraries to pursue continuing education.

8. Prepare learning packages for local use, as well as for sharing and exchange.

9. Conduct continuing education activities for local staff and board members which contribute to local and area library goals and objectives.

10. Co-sponsor continuing education activities with other groups.

11. Evaluate continuing library education opportunities available to the people within the system.

12. Communicate information about continuing education opportunities to the library community within the system.

13. Support continuing education activities of library associations through institutional membership and active participation.

D. The Library Associations---Local, State, Regional, National

1. Identify continuing education needs as an outgrowth of association planning and program development.

2. Assist in setting standards and guidelines as well as evaluating continuing education programs.

3. Encourage membership to participate in continuing education programs.

4. Identify continuing education experts among the membership and encourage use of their abilities.

5. Establish and maintain a committee on continuing education to participate in the development, implementation and evaluation of a state-wide continuing education program.

6. Commit conference time and resources to continuing education.

7. Conduct workshops, seminars, institutes, etc., with existing membership as the target audience.

8. Publish and produce materials such as learning packages which contribute to the continuing education of the membership as well as librarianship-at-large.

9. Provide a communication channel for dissemination of information about continuing education opportunities.

10. Co-sponsor continuing education activities with other groups.

E. The Library Programs

1. Prepare individuals for competence in library positions at all levels through formal programs of study----two-year programs, undergraduate programs, graduate programs.

2. Alert students to the concept lifelong education and their responsibilities for continuing education.

3. Emphasize, throughout formal course structure, the continuing education responsibilities of administrators and supervisory staff.

4. Encourage staff participation in continuing education.

5. Create and fund faculty positions specializing in continuing education.

6 Help in training continuing education specialists for the field.

7. Participate in the development, implementation and evaluation of a state-wide continuing education program.

8. Provide consultant services.

9. Conduct institutes, short courses, seminars and workshops.

10. Provide evaluation of existing opportunities for continuing education.

11. Co-sponsor continuing education activities with other groups.

12. Encourage interface among library education program, employing libraries, systems, library associations and state agencies.

13. Prepare and distribute learning resources which contribute to the continuing education of individuals in remote areas.

14. Research.....

F. The Illinois State Library

1. Identifies priorities among continuing education needs of the state.

2. Fulfills the continuing education responsibility as the employing library for the state library staff.

3. Established policies and procedures that stimulate institutions to provide and individuals to take advantage of opportunities for personal development.

4. Plans, implements and evaluates state-wide continuing education programs based on needs identified in over-all library planning activity.

5. Assigns staff to be responsible for continuing education.

6. Provide consultant services in the realm of continuing library education for all groups within the state.

7. Provides a link between individual libraries, systems, regional and national programs for continuing education.

8. Experiments with new training techniques and reward systems.

9. Produces learning packages for specific utilization within the state.

10. Coordinates state-wide continuing library education programs involving those who work in and with libraries.

11. Cooperates with other groups in providing continuing education opportunities.

12. Sponsors special institutes, workshops, seminars, etc., as needed which contribute to state-wide library development.

13. Justifies continuing education for those who work in and with libraries to the state funding body to insure adequate support for such activities.

14. Selects and maintains collection of nationally developed learning materials for continuing education programs in Illinois libraries.

15. Research.....

GLOSSARY

1. Continuing education
2. Staff development
3. Learning packages
4. Incentive plan
5. Service needs
6. Reward systems
7. Interface
8.
9.
10.
11.
12.

FACT SHEET

ILLINOIS STATE LIBRARY
Advisory Committee on Education and Training

The Illinois State Library Advisory Committee on Education and Training will be composed of twenty-seven individuals: nine (9) representing librarians, nine (9) representing public library trustees and nine (9) representing library educators. Each group of representatives will serve as sub-committees: The Librarian Sub-Committee, the Trustee SubCommittee and the Library Educators Sub-committee.

The Librarian Sub-Committee shall include two (2) system directors, two (2) system staff members with educational responsibilities, one (1) untrained public librarian, one (1) professionally trained public librarian, one (1) school librarian, one (1) special librarian and one (1) academic librarian.

The Trustee Sub-Committee shall be composed of nine (9) public library trustees.

The Library Educators Sub-Committee shall be composed of three (3) representatives from the ALA accredited programs in the state, three (3) representatives from the non-ALA accredited programs in the state, and three (3) representatives from the two year programs in the state.

The Committee shall also include ex-officio members as are appropriate to the functioning of the Committee. They shall include: (1) President, Illinois Library Association, (2) President, Illinois Public Library Directors Association, Illinois Library Association, (3) Chairperson, Illinois Library Association Committee on Continuing Education, (4) President, Library Administrators Conference of Northern Illinois, (5) President, Illinois Chapter, Special Library Association, (6) Chairperson, Illinois Regional Library Council Continuing Education Committee, and (7) Executive Secretary, Illinois Library Association.

PURPOSE

To aid the Illinois State Library in planning for the coordination of educational and training activities to meet the needs of the library community in Illinois:

* to promote the concept of the development of each individual working in and with libraries to the extent of his ability and potential.

* to serve as advisors and reactors to potential programs pertaining to the development of those working in and with libraries.

* to identify unmet educational and training needs of those working in and with libraries in Illinois for action by the appropriate groups -- library associations, library education, systems, state agencies, consortia, local libraries and combinations thereof.

* to promote the implementation of in-service and continuing education activities to meet needs not currently being met by the various organizations and agencies engaged in these activities.

OPERATING PROCEDURES

The overall Committee shall meet not less than twice nor no more than four times annually depending upon planning and functional needs. The Committee will choose its own Chairman and Vice-Chairman at its first meeting and annually thereafter.

The sub-committees will also choose their chairmen at the first meeting and annually thereafter. Each sub-committee would be free to function as a unit if a particular activity or proposal is deemed particularly appropriate.

Terms of committee members shall be for three years and staggered. Terms for the original Committee will be determined by lot at the first organizational meeting. Each sub-committee shall have three members with three year terms, three members with two year terms, and three members with one year terms. Thereafter, all terms shall be for three years with three members retiring each year.

Expenses for committee members to attend approved meetings as scheduled are borne by the Illinois State Library in accordance with travel regulations of the Secretary of State's Office.

ISL
TET/caf
6-17-76

SUMMARY

The Continuing Library Education Planning and Coordination Project
University of Wisconsin-Extension, Madison
Communication Programs

Continuing education planning for library personnel in Wisconsin currently focuses on the recommendations of the Final Report of the Task Force on Library Manpower and Education to the Council on Library Development. This report, published in June of 1975, is the result of two years of consideration of the manpower, training, and education needs of Wisconsin's libraries and a year long directed investigation of these needs. The investigation was supported by LSCA funds granted by the Division for Library Services Department of Public Instruction under contract with the University of Wisconsin-Extension. The Task Force on Library Manpower and Education found the coordination of existing programs, the on-going assessment of continuing education needs, and the encouragement of new programs to meet these needs, essential to the development of the manpower necessary for Wisconsin libraries.

These findings serve as the basic concepts of the Continuing Library Education Planning Project. It is expected that this project will exist on a pilot basis for three years of LSCA funding after which, if successful, it will be incorporated into the on-going program of the Division for Library Services. The project is presently funded at $20,000 for its first year; based in the Communication Programs of University of Wisconsin-Extension, Madison; and scheduled to become operative September 1, 1976. The project staff will consist of a half-time continuing education coordinator and a half-time clerk typist. Professor Muriel L. Fuller, University Extension, will devote 5% of her time to the administration of the project and serve as Project Administrator.

The Continuing Library Education Planning Project seeks to provide the coordinative element now lacking in Wisconsin's continuing education programs for library/media personnel. This is to be accomplished through working with agencies of continuing education, and those interested in developing such programs for library, media and information center staff, and the staffs themselves. The project will not attempt the generation of continuing education programs but will work in a cooperative mode. Four broad areas of concern provide the project focus: needs assessment, resources, communication and evaluation.

During the first year of the proposed three year pilot project evaluation will not be considered. Emphasis in the first year is to be placed on (1) establishing communication among individuals and organizations through a newsletter, telephone and direct contact; and (2) planning for the actualization of the recommendations of the Task Force on Library Manpower and Education. The specific tasks, on-going activities, and planning which make up the first year program are the result of interaction with other agencies, organizations, associations, and individuals and may be modified by the cooperative work mode of project staff and the central project purpose--coordination. It is expected that any such modification will be consistent with project goals and the attached first year goals and measurable objectives.

As the initial stage of this project stresses development of communication and planning, the first year of the project will be evaluated through internal assessment.

7/8/76--150 c

First year goals and objectives

Needs Assessment

A. To inventory and prioritize already articulated Wisconsin Library/media personnel continuing education needs.

Measurable Objectives

1. The acquisition and organization of extant data on Wisconsin library/media staff continuing education needs.

2. The publication in the last report of a prioritized list of continuing education needs drawn from the extant data acquired by the project staff.

Resources

A. To investigate the possible relationships of the Division for Library Services to agencies involved in continuing education, local and regional governing bodies, associations, etc. and to suggest patterns for coordination.

Measurable Objectives

1. The presentation of alternative patterns and plans for coordination in quarterly reports to the Division for Library Services.

B. To facilitate awareness of library/media continuing education roles, goals and objectives of respective agencies, institutions and associations involved in such programs in Wisconsin.

Measurable Objectives

1. The acquisition of statements of continuing education functions from the agencies, organizations and institutions identified in the Task Force on Library Manpower and Education Report.

2. The publication and distribution, at the close of the first funding year, a directory of Wisconsin library/media related agencies, organizations and institutes continuing education functions, including roles, goals and objectives of each.

C. To identify and disseminate information on library/media continuing education activities.

Measurable Objectives

1. Membership and participation in CLENE, Continuing Library Education Network and Exchange, including search of CLENE's continuing education data base as requested.

2. Preparation of a calendar of Wisconsin continuing education activities for library personnel and distribution three times a year through the newsletter.

3. The establishment and maintenance of a file of library/media continuing education activities outside the state of Wisconsin.

Communication

A. To establish contact with agencies, institutions, organizations, and individuals currently concerned with library/media continuing education in Wisconsin.

Measurable Objectives

1. The attendance of project staff at library/media conferences and meetings such as Wisconsin Library Association, Wisconsin Audio-visual Association, chapter meetings of ASIS, SLA and CLA, and interlibrary cooperatives.

2. Staff maintenance of a telephone and activity log twice a month; and, analysis of the log as part of the quarterly report.

B. To develop channels for communication among agencies, institutions organizations and individuals interested in library/media continuing education in Wisconsin.

Measurable Objectives

1. The publication of a newsletter concerned with library/media continuing education three times during the year.

2. The establishment of a Library Continuing Education Council by the close of the first project year.

C. To develop initial procedures for statewide library/media continuing education planning.

Measurable Objective

1. The presentation of designs for needs identification and assessment; and for linking human resources to agencies, etc., in the quarterly reports and in the second year funding proposal.

Wisconsin and CLENE

The Office of the Continuing Library Education Network and Exchange (CLENE) has announced completion of some organizational steps that will transform it from a largely ad hoc planning organization to a formally structured continuing education service in support of all libraries and information services.

CLENE had its origins in a study project established under the aegis of the National Commission on Libraries and Information Science. With Dr. Elizabeth Stone of Catholic University as project director, and the assistance of an advisory committee, a substantial report was developed on *Continuing Library and Information Science Education*.

One of the key recommendations of the report was that there be a permanent Continuing Library Education Network and Exchange at the national level. It is to be based on continuing liaison with national organizations in library and information science, and its exact functions will be established through a continuing assessment of priority needs.

Articles of incorporation have been drawn, and a Board of Directors has begun to function. At the close of the American Library Association Midwinter meeting in Chicago, the first CLENE Assembly will meet. This is the largest and most thoroughly representative of CLENE's organizational components, and on it will rest primary responsibility for needs assessments. Between its Board and the Assembly will be an Advisory Committee. Bernard Franckowiak and I have had the privilege of serving on the ad hoc advisory committee since January.

Wisconsin and eight other state library agencies have committed small amounts for initial CLENE operations, and CLENE has received several federal grants to test some initial services.

What can CLENE do for Wisconsin? Among its first scheduled activities are the issuance of a newsletter, *CLENE Exchange*, and the publishing of an annual listing of continuing education opportunities in library, media and information science.

Future activities depend upon the Assembly's needs assessment. Among earlier ideas are that it might identify gaps in available continuing education offerings and produce or contract for learning programs which could fill the gaps. Since it could not and should not build a separate faculty, its learning programs might appear as multimedia packages, or even computer-assisted programs.

The Report of Wisconsin's Task Force on Library Manpower and Education has been sent to CLENE. It is hoped that Wisconsin librarians, information scientists and media personnel will continue to offer suggestions to, and ask questions of, CLENE. The CLENE Office (620 Michigan Avenue N. E., Washington, D.C. 20064) can offer transparencies, slides and printed script to explain its activities to interested groups.

The future of CLENE is in your hands, as well as those of its organizational components. It offers the challenge of making work a user-oriented collaborative national effort, which must emerge from the give-and-take of organizations with priorities which have clashed in the past.

— **W. Lyle Eberhart**

Report of the task force on

Library manpower and education

Summary and recommendations

David R. Hoffman

Mr. Hoffman served as Project Coordinator for the Task Force on Library Manpower and Education from July 1974 to June 1975. The full report, from which this article is derived, is available from the Division for Library Services, 126 Langdon Street, Madison 53702.

Background

In December 1973 the Council on Library Development set up a task Force on Library Manpower and Education to carry out an integrated study of library manpower and education needs in Wisconsin, and of the resources available to meet those needs. The project was funded by Library Services and Construction Act Title I and III funds.

The Task Force, representative of all library and media associations in the state, types of libraries, media programs and library education, was chaired by Muriel L. Fuller, Chairman of the Department of Communication, University of Wisconsin—Extension, and functioned through a steering committee and three working groups: Manpower, chaired by Leroy Zweifel, UW—Madison Engineering Library; Library Education, chaired by Joseph A. Boisse, UW—Parkside Library; and Certification, chaired by Barbara Bartley, UW—Milwaukee School of Library Science.

The Task Force set six objectives for the study:

1) To determine library personnel requirements in Wisconsin for the decade 1975-1985 including numbers and levels of positions and the professional knowledge and technical skills needed for providing the changing patterns of library service.

2) To determine the library education resources in degree programs and continuing education programs as they relate to Wisconsin.

3) To develop recommendations concerning library education programs in Wisconsin in relation to personnel needs.

4) To develop recommendations concerning continuing education programs for library personnel.

5) To consider and develop recommendations on certification requirements for library personnel.

6) To develop a model for continuous updating of information about personnel needs, library education and certification.

The study was concerned with personnel at all levels, in all types of libraries, media centers, information centers and similar organizations whose common purpose is the collection, organization and dissemination or making available for use recorded knowledge in its several forms.

The project was administered by the UW—Extension Department of Communication, with David R. Hoffman as Project Coordinator, and Peter A. Neenan as Project Assistant. The project staff conducted the study, assisted in formulating recommendations and prepared the final report. The workin

groups advised the project staff in the development of the study, evaluated the results and forwarded their recommendations to the Task Force, which reviewed the reports of the three working groups and forwarded the entire report to the steering committee. The steering committee acted as the Executive Committee of the Task Force, and in its final action approved the report with recommendations, for transmittal to the Council on Library Development.

Procedures

The project staff began its investigation with an intensive examination of recent library manpower and education studies undertaken in other states, and relevant national studies, as well as previous state studies in Wisconsin. The staff was able to take advantage of strengths in concept and design in other studies, and could incorporate some of these into plans for gathering and evaluation of data in Wisconsin. No one of these studies, however, addressed itself to all of the objectives set forth by the Task Force. Hence the staff found it necessary to prepare a study design which would provide sufficient breadth and width of coverage to meet these objectives.

A questionnaire addressed to librarians was used to gather data on numbers of people presently employed at several levels of responsibility and at several educational levels, needs and attitudes toward continuing education, attitudes toward certification, some comments on appropriateness of present library/media education programs, and a forecast of the numbers of people at the several levels of responsibility who might be needed to provide library service in the decade ending 1985.

Considerable consultation was undertaken by the staff with the U.W. — Extension Wisconsin Survey Research Laboratory to determine the best means to arrive at a properly representative sample of personnel in different types of libraries and with different levels of job responsibility. The Laboratory drew the sample of administrators and staff members based on statistical information on staff size and enrollment provided by the study staff. Since it was desirable that some of the questions be put to school administrators as well as librarians, a sample of district administrators was drawn reflecting student enrollment levels by district.

The Survey Laboratory duplicated and mailed the questionnaires in January 1975, and mailed a follow-up reminder to nonrespondents after an appropriate interval. Responses were analyzed by the Survey Laboratory in consultation with the project staff; in those instances where responses were unclear, the determination of appropriate answers, or decision to code the answer as a nonresponse, was made by the project staff. The Laboratory provided coding, key-punching, and tabulation of the responses. Responses were sorted both by population group and by level or respondent's professional education. (See tables page 309.)

The project invited the heads of the state's library/media education programs to a meeting in Madison on October 5, 1974 to discuss proposed means of gathering information for the study, the kinds of information on education programs which the staff needed, and the kinds of information which the project might provide to the educators. An interview schedule was prepared for this purpose, and between November 1974 and February 1975 visits were made by the staff to each of the campuses offering library science programs, and the university departments offering bachelor's or graduate degrees in the audiovisual fields.

As a follow-up, the heads of these programs were invited to a second meeting, in Wisconsin Rapids on April 30, 1975, to review and react to the first drafts of conclusions and recommendations from the project staff. The staff found both meetings particularly valuable as a result of the interactive style afforded. Representatives from a number of the programs provided further data and suggestions for the staff and Task Force, and attended meetings of the Working Groups and Task Force as observers.

Factual data were gathered from a variety of sources for use in developing recommendations or making forecasts. Enrollment projections through 1985 were obtained in Fall 1974 from the registrars of nonpublic institutions of higher education (some institutions had not developed projections this far in advance); projections through 1984 were obtained from the University of Wisconsin Central Administration for all campuses in the state system; projections through 1980 for the Wisconsin system of vocational, technical and adult education were obtained from the State Board for Vocational, Technical and Adult Education. The Department of Public Instruction provided forecasts of enrollment in the public and nonpublic schools through 1978. The Population Projection Program of the State's Department of Administration provided population projections through 1985.

It is the judgment of the project staff that the response rate in this survey is sufficient to enable generalization to the universe of individuals in such positions in the state:

Population group	Sample size	Usable responses	Response rate
Academic library directors	80	61	76%
Academic library staff members	97	73	75%
Special library directors	98	56	60%
Special library staff members	113	79	70%
Public school library directors	100	61	71%
Public school library staff members	99	73	74%
Nonpublic school library directors	100	62	62%
Public library directors	100	74	74%
Public library staff members	100	70	70%
Public school district library supervisors	20	16	80%
Public school administrators	100	62	62%

A second questionnaire was designed to gather information on background and perceived educational needs of public library trustees in the state. Like the questionnaire for librarians, it was pretested with a sample group of trustees,and it was also reviewed by the Executive Board of the Wisconsin Library Trustees Association. One hundred library board presidents and a hundred library board members were randomly selected from lists of boards maintained by the Division for Library Services; the project office mailed the questionnaire, coded and analyzed the responses.

It is the judgment of the project staff that the response rate is sufficient to enable generalization to the larger group of library board members in the state:

Category	Sample size	Usable responses	Response rate
Library board presidents	100	57	57%
Library board members	100	40	40%

At the request of the Manpower Working Group, the project staff invited a group of a dozen librarians in key positions to a round-table discussion on qualitative trends that will affect manpower needs in the coming decade. At that meeting, on May 29, 1975, twenty-four possible trends which might impact upon personnel needs were identified, and the respondents were asked to indicate the degree to which each trend might have an effect upon the various types of libraries.

Staff conclusions and recommendations were prepared on the basis of questionnaire responses and other data gathered, and were distributed to members of the Task Force and to heads of the library/media education programs. The Task Force's three working groups met in Madison in May (Library Education, May 7; Certification, May 12; Manpower, May 14). These groups considered and discussed papers presented by the staff, and accepted, modified or rewrote them as appropriate. Reports and recommendations from the Working Groups were reproduced and circulated again to the entire Task Force and to heads of the education programs.

On June 12, 1975, the Task Force met as a body and, in toto, considered each of the recommendations in the form adopted by the appropriate working group, again with the option of acceptance, rejection or modification. The reports and recommendations coming from the Task Force were then considered by the Steering Committee at its meeting on June 24.

The Steering Committee formally adopted the report and recommendations on June 24, and directed its transmittal to the Council on Library Development. The Council accepted the report in principle on August 13, subject to specific actions in regard to individual recommendations. It voted on September 29 to forward the various recommendations to concerned organizations for study and action.

Summary of findings and recommendations

The Task Force has reviewed the available data on present and potential future requirements for personnel in library, media and information programs. It notes a variety of factors which will have effect on the numbers of persons required to provide library service during the decade ending 1985, but it does not offer a firm projection for the future. It considers estimates of needs made by directors of library programs to be fairly close to the maximum growth which may be anticipated, and the status quo forecast based on maintenance of present ratio of personnel to population or enrollment to be fairly close to the minimum growth that might be expected statewide. It anticipates that the actual growth may fall between these two.

It has considered some of the dynamic factors which will affect Wisconsin's need for library personnel, and it notes the variety of factors, trends and issues identified in the course of the study.

Some 21 universities, colleges, and technical centers in Wisconsin offer formal programs for the education of library and media personnel at a variety of levels, and with a variety of specific goals. Informal and continuing education programs are also made available by a number of professional associations and other agencies.

The Task Force considered the material gathered on present education programs in Wisconsin and the policies and guidelines on library education adopted by the American Library Association, as well as the responses to questionnaires addressed to library administrators, library staff members, school administrators and public library board members, in arriving at recommendations on library/media education, including both degree programs and continuing education.

The Task Force recommends:

1) That *Library Education and Manpower*, a statement of policy adopted by the Council of the American Library Association, June 30, 1970, serve as the guideline within which library education programs in Wisconsin are developed, except to the extent that it must be modified by certification structures developed by legitimate certifying bodies within the state which have had the cooperation of the library profession.

Cognizant of the continuing need for library education programs at the undergraduate level, the Task Force noted the important relationship between undergraduate library education and general liberal education, and between undergraduate and graduate library education programs.

The Task Force recommends:

2) That care be taken that the quantity of technical and professional courses taken at the undergraduate level does not crowd out general liberal arts and science education. It further recommends that to this end those responsible for library education programs at both undergraduate and graduate levels maintain effective and continuing contact with counselors and advisors for undergraduate students.

3) That strong efforts be made to develop and continue articulation and coordination between library/media education programs at their several levels.

4) That the newly-formed Education Section of the Wisconsin Library Association take the initiative, through the formation of a sub-section or other appropriate unit, in bringing together representatives of all the library/media education programs in the state, to meet together for continuing study and review of library/media education needs and for joint planning where appropriate.

The Task Force believes that with three universities offering master's degrees in library science, and three offering such degrees in audiovisual communications or educational technology, Wisconsin has the capacity to meet foreseeable needs for new graduates in these fields, especially if these graduate programs are articulated with undergraduate programs and are coordinated with each other.

The Task Force recommends:

5) That universities which offer master's degrees in library science, audiovisual communications, or educational media, develop cooperative plans which, subject to policies governing the individual university or imposed by relevant accrediting bodies, would permit students to take advantage of unique strengths in other departments or on other campuses when appropriate to career goals.

The Task Force believes that geographic factors keep some persons who might enter graduate study in these fields from actually doing so; if at least a part of a graduate program could be made available in a more convenient location, it feels more persons would engage in graduate study.

The Task Force recommends:

6) That universities offering master's degrees in library science, audiovisual communications or educational media review the possibilities of offering their courses on other campuses which do not have similar programs, when appropriate library, laboratory or other facilities are available.

Evidence gathered in the study, supported by experience of members of the Task Force, points to the sometimes divergent expectations of library education programs from the points of view of the student, the employer and the educator.

The Task Force recommends:

7) That the Council on Library Development establish a broadly represent-

tive group, charged with continuing study of degree-oriented library education in Wisconsin, including but not limited to the following items:

a) Employers' expectations of the knowledges and skills graduate library programs in Wisconsin should provide to meet the needs of their libraries.

b) Student perceptions regarding the appropriateness of their education.

c) Identified needs for skills not currently being met which are feasible to be included in graduate curriculums.

d) Identified needs which should be the responsibility of the employer through the provision of inservice training and of the employee through participation in continuing education programs.

Data from the questionnaire survey identify preferred formats, agencies and subjects for continuing education, both by type of library and/or responsibility, and by level of current education of the respondents. Respondents also gave some reasons for nonparticipation in continuing education programs. The survey provides information on institutional policies regarding continuing education as well as respondents' views of the importance of continuing education.

The Task Force recommends:

8) That the Division for Library Services establish a library/media continuing education council, representing institutions with different levels of library-media education programs, the several professional associations in the library media field, and representatives of persons employed in libraries and media centers with different levels of education and different levels of job responsibility. It recommends that this council be charged with identifying and assessing continuing education needs of library media personnel, working with appropriate agencies to see that programs are developed to meet these needs, keeping up to date the information already gathered about current library/media education programs, and taking responsibility for statewide publicizing of these programs. It further recommends that the Division provide staff and funds to support the work of the council.

The Task Force strongly emphasizes its feeling that continuing education programs should be designed for and made available to personnel at all levels of education and levels of responsibility in library/media programs. Data gathered in the course of the study suggests that too often such opportunities are not offered to paraprofessional or support staff.

The Task Force recommends:

9) That those responsible for setting personnel policy and those responsible for the administration of library/media programs be encouraged to recognize continuing education as one of the bases for promotion or salary advancement, for personnel at all levels of responsibility.

10) That library/media personnel at all levels be encouraged to participate in appropriate continuing education programs.

Data gathered from public library board members indicates that a high percentage received no orientation to their responsibilities upon being named to their boards.

The Task Force recommends:

11) That a model orientation program for public library board members be designed, using the joint efforts of the Wisconsin Library Trustees Association, the Wisconsin Division for Library Services, representatives of local government, library administrators and the University of Wisconsin—Extension Department of Communication, which might be used or adapted by local libraries or library systems.

Library board members indicated that they considered the Wisconsin Library Trustees Association helpful in meeting their needs as trustees, yet a fairly low number actually belong to WLTA or to the American Library Trustee Association, and more than a quarter indicate that they have not been asked to join.

The Task Force recommends:

12) That WLTA and ALTA examine their membership recruiting procedures to determine whether their means of reaching potential members are as effective as they might be.

The survey provides specific ranking, by library board members, of topics related to their responsibilities as trustees on which they want more information.

The Task Force recommends:

13) That organizations or agencies preparing programs for public library board members take the relative importance assigned to the various topics in responses to the questionnaire into consideration as they plan such programs.

A number of agencies and organizations were identified in the questionnaire as useful to trustees in meeting their continuing education needs. The Task Force feels that coordinated activity among these bodies will yield more useful trustee programming than otherwise.

The Task Force recommends:

14) As a part of the Library/Media Continuing Education Council, there be a committee on programs for library board members, with at least representation from the Wisconsin Library Trustees Association, the Wisconsin Division for Library Services, the University of Wisconsin—Extension Department of Communication, the several levels and types of library/media education programs, library administrators and local government. It recommends that this committee be charged with reviewing on-going education programs for library board members, identifying needs not met by on-going programs, working with appropriate agencies or organizations in appropriate ways to meet those needs, and making information about such programs available to library board members throughout the state.

The state presently certifies professional library/media personnel in public schools and in the system of vocational, technical and adult education, and public librarians except in cities of the first class and in communities of under 2000 people. Voluntary professional certification programs are offered, in addition, by the Medical Library Association and the American Association of Law Librarians.

The Task Force recognizes that there is no central agency at the state level which has governance authority over academic or special libraries. It encourages participation in such voluntary certification programs as those provided by the MLA and the AALL, but it does not recommend the institution of mandatory programs for the certification of professional personnel in academic and special libraries in Wisconsin.

The Task Force recommends:

15) A program of certification for public library personnel, as follows:

Certificating agency: The Division for Library Services of the Department of Public Instruction, advised by the Council on Public Library Certificates and Standards.

Types of certificates: Three grades, for heads of libraries and for other positions on library staffs as determined by local library boards. Libraries may require personnel with professional or technical preparation in other fields, but certification in other specialties is not proposed.

Grade 1: Requiring a bachelor's degree from a college or university approved by an accrediting association of more than statewide standing, and in addition a fifth-year degree from a library school program accredited by

the American Library Association the Division may satisfy itself by examination or evaluation of credentials whether persons who hold fifth-year degrees from library school programs not accredited by the American Library Association are competent to provide professional library work ably and efficiently, and if so it shall grant them Grade I certificates upon application.

Grade II: Requiring a bachelor's degree from a college or university approved by an accrediting association of more than statewide standing, including or supplemented by courses in public library administration, selection of library materials (including nonprint materials), the organization of library materials, and reference and information service.

Grade III: Requiring at least two years of study in a college or technical institution, in a program which includes courses in the liberal arts and sciences and course work in librarianship at least equivalent to the University Extension Directed Home-Study Course A-50, Basic Library Management for Public Librarians; the Division may approve other course work as equivalent.

Types of certification: All certificates should be issued for five-year periods. Permanent certificates issued under previous certification programs should continue to be valid for the position which the incumbent holds at the time of adoption of the new program.

Renewal of certificates: Certificates may be renewed upon evidence that the holder has participated in continuing education in librarianship which is either directly related to the position held or will permit advancement in the profession. The Council on Public Library Certificates and Standards should define continuing education requirements, including numbers and types of programs that would qualify persons for recertification and a method of verifying participation of the chief librarian and staff members in continuing education. Upon the second consecutive renewal, a life certificate shall be issued.

Application of certificates: head librarians: Administrators of public library systems, and head librarians in all libraries serving at least 10,000 population should hold Grade I certificates. Heads of libraries serving at least 2500 persons but not more than 9999 persons should hold at least Grade II certificates. Heads of libraries serving fewer than 2500 persons should hold at least Grade III certificates.

Application of certificates: staff positions: Unless otherwise required in the *Administrative Code*, the library system or local library board should determine the grades of certificates to be held by persons in various positions in the system or library.

Enforcement: Funds disbursed by the Division for Library Services should not be distributed, directly or indirectly, to any public library which does not employ as head librarian a person who holds appropriate certification.

The Task Force recommends:

16) A program of certification for school media personnel, as follows:

Certificating agency: The Department of Public Instruction.

Types of certificates: three types, as listed below.

Media district supervisor: Requiring successful experience as a school media specialist, and courses beyond the master's degree in principles of school administration, supervision or personnel management, and school librarianship, educational technology, or information science.

Media specialist (Level I): Requiring a teaching license and a master's degree from a program that combines library and information science, educational communications and technology, and curriculum. The academic preparation will provide for the development of competencies relating to the provision of effective media programs.

Media specialist (Level II): Requiring a teaching license and a bachelor's degree from a program that includes courses in library science and educational technology. The academic preparation will provide for the development of competencies relating to the provision of effective media programs.

Terms of certification: Terms of certification, and renewal, should be consistent with teacher certification practices. Renewal should recognize the importance of continuing education.

Application of certificates: The Media District Supervisor certificate should be held by persons responsible for supervision of district-wide media programs. The Media Specialist (Level I) certificate should be held by persons responsible for building-level programs which combine library and audiovisual services. The Media Specialist (Level II) certificate should be regarded as minimum requirement for persons responsible for building-level programs. Professional media personnel other than those responsible for administration of district or building-level programs should hold certificates at a level determined by the local school district.

Application of certificates to nonpublic schools: Although nonpublic schools are not obligated to employ licensed or certificated media personnel, they should be encouraged to do so, and qualified personnel in nonpublic schools should be encouraged to seek certification.

Library education

University of Wisconsin—Milwaukee School of Library Science announces new faculty members: Dr. Elaine Folk Fain, Ph.D. UW Madison, Assistant Professor, teaching special libraries and collection development; Assistant Professor Ronald F. Sigler, completing doctoral work in School of Library Science, Florida State University, teaching public libraries and audiovisual services. The School moved in September to the first and second floors and lower level of the north wing of Mitchell Hall. Dial (414) 963-4707 for the Director.

Practicing librarians may be interested in some of the courses offered January 26-May 29 by the UW—Madison Library School: Organizational Behavior for Librarians, 1-3:15 Wednesday; Trends in Information and Document Processing, 4-5:15 Tuesday, Thursday; Library Service to an Aging Population, 4:30-6:30 Tuesday; Topics in Literature for Children and Young Adults, 4-6 Thursday; Planning Reader Services in the Context of Public Library Systems, 9-11:30 Friday; Comparative Librarianship, 1-3:15 Monday. Inquire of Mrs. Phyllis Boyle, Helen White Hall, Madison 53706.

Indian Library Service, an Educational Telephone Network (ETN) course planned by the Joint Library Committee of the Great Lakes Intertribal Council and the Division for Library Services, is coordinated by Janice Lincoln, a Winnebago from Tomah, and offered this winter by the UW—Extension Department of Communication.

A plan to count three years on the job as one year of academic work for persons approved by a screening committee of senior staff is proposed by Director Ervin Gaines of the Cleveland Public Library.

A study of the status of education for librarianship is in progress by Dr. Ralph Conant and the sponsorship of the American Library Association with a grant from the H. W. Wilson Foundation. A research team interviewed faculty, students, alumni and administrators in about 20 graduate schools, and studied personnel requirements of employers.

ETN . . . A Way Not to Travel

by Dr. Lorne A. Parker, Director
Instructional Communications System
University of Wisconsin-Extension

From its performance, ETN sounds like a new way to travel, because via ETN:

- *A plant pathologist alerts agricultural agents everywhere in the state about a corn blight outbreak;*
- *14 separate classes of undergrads meet with and question a leading expert on pharmacology;*
- *A speaker from a National Social Workers Convention in San Francisco lectures to students and professionals in ten Wisconsin locations;*
- *University extension faculty members get together for a state-wide meeting . . .*

More precisely, ETN is a new way *not* to travel. The letters stand for the *E*ducational *T*elephone *N*etwork at the University of Wisconsin.

It is a private, four wire telephone network developed in the mid-sixties and considerably improved in 1974 by the UW-Extension to expand educational opportunities at a minimal cost to the state's residents.

By linking together UW campuses and centers, hospitals and clinics, courthouses and agricultural centers, libraries, a high school, and a dozen administrative offices, the network provides an instant, personal educational channel for more than 100 Wisconsin communities and 200 specific meeting places.

To operate, ETN uses a new communications unit, the Edu-Com, developed by engineers at Darome, Inc., Harvard, Ill., in conjunction with Wisconsin Bell Telephone and the University of Wisconsin.

The Darome Edu-Com is a self-contained communications unit, with four microphones, that plugs into a standard telephone coupler. All stations in the network use the portable Darome Edu-Com unit. No technical skill or special knowledge is needed.

The suitcase-sized Edu-Com (inset) is a self-contained communications unit with four microphones and provisions for more that plugs into an inexpensive coupler supplied by the telephone company to meetings at several locations via telephone lines.

Anyone in any of the participating ETN locations can be heard in any of the other linked locations simply by pressing the lever on one of the Edu-Com microphones and speaking into it. The speaker will be heard as if he were right in each meeting room.

ETN was originally started to meet the needs of medical doctors for continuing education. Now the network provides educational experience for more than 24,000; students.

For many years the UW Extension has offered graduate credit courses to teachers in various Wisconsin communities. Through ETN, on campus professors expand the classroom boundaries out to isolated areas, offering graduate education to many people in their own communities.

An ETN program varies from one to three hours and consists of a lecture session followed by a question-and-answer period. Professors lecture from various ETN centers, allowing each class around the state to participate in some "live" lectures. Slides, tapes and 16mm films, mailed in advance from Madison, are used in conjunction with the lecture at each location.

The network is used in many different ways. Each Monday at 9:00 a.m., a statewide faculty meeting is held. Daily at 8:30 a.m. messages to facilities in the counties are sent and immediately following the traffic is reversed so that messages from agents are received by University Extension in Madison.

After the daily message service, the network is reserved for 15 minutes for the county agents who confer with each other, either by prior arrangement or by spontaneous queries.

Our clients like the network because it means convenient access to teaching resources. Its special capabilities make it significant as an educational media:

- *It provides "continuing" education; participants receive limited amounts of information frequently, rather than in massive doses once a year;*
- *It offers great economy in time and money. Neither faculty nor students need travel far or spend much time away from their usual responsibilities;*
- *It reaches new audiences, previously neglected. For example, each month some 500 housekeeping personnel and 400 food service workers in 70 ETN hospitals attend training programs through ETN;*
- *It reaches isolated professionals who otherwise would be in an educational vacuum;*

The cost per instructional hour for noncredit programs on ETN averages out to 14 cents per student hour. This cost reflects only the network production and operation costs, not the instructional materials such as slides, printed matter, etc.

The network's great potential has been only lightly tapped. With the proper planning, imagination and ingenuity, its future prospects are increasingly more exciting. ■

For information about products advertised on page 83 circle 183 on reader service card.

Small Group Discussion
Group 12

THE KNOWLEDGE BROKER

Workshop Leader: Alan B. Knox, Professor of Continuing Education and Director of the Office of Continuing Education and Public Services, University of Illinois

Workshop Recorder: James A. Nelson, Director
Office for Continuing Education
College of Library Science,
University of Kentucky

For the purpose of this document both afternoon and evening discussion groups will be summarized as one report. There were six people at each session and although there were some general differences between the two discussion groups, it all fell within the framework of the different aspects of the knowledge broker concept. Both groups set their own agenda for items to be covered during the discussion and Dr. Knox dealt with these agenda items as a resource consultant.

There was some confusion in both groups with regard to the two perspectives on the knowledge broker concept. In one perspective the knowledge broker is viewed as the librarian serving in the knowledge broker role with the library patron or client. In this first role the librarian/knowledge broker serves to facilitate the clients' search for the most appropriate direction which they could take in meeting their own long-range goals. In this role the knowledge broker serves much like the "mentor" in traditional andragogical concept. The librarian/knowledge broker helps the individual to set short-term achieveable objectives

while at the same time directing him or her to the most appropriate resources, both human and material, for meeting these objectives.

The second perspective of a knowledge broker is from the point of view of a supervisor within a staff organization or as a state library consultant working with local library systems. In the second perspective the knowledge broker still has the responsibility to help the staff or organization in designing the best way to meet their own objectives but more is known about the environment to be dealt with in this second perspective. The knowledge broker in this role knows pretty much what the variables will be in the organizational setting and can facilitate the learning program with this knowledge in mind.

Both perspectives require similar functions to be performed by the knowledge broker: an important function is to "turn people on" or to whet their appetite for the learning experience; the knowledge broker must be well versed in resources available to facilitate learning and in this aspect would serve the referral function by referring people to the most appropriate resources; the knowledge broker would help to set achieveable objectives while opening up possibilities for long-range goals; and, an important function of the knowledge broker is to get the learning process moving in a self-directed way so that it will continue beyond his or her involvement in the process.

Several cases were discussed to illustrate the functions of the knowledge broker. One such case looked at the state library consultant visiting a local public library system and through a non-threatening process of consultation

(over coffee, at lunch, and other non-threatening types of contacts) would help to identify and articulate problems which could be solved with education strategies. The knowledge broker would then suggest some techniques for training and help the local system set its own learning objectives and recommend some resources which could be used in their training program. By isolating a few libraries in the state and working in this manner the rippling effect could set the tone for statewide involvement in staff training and development.

Related to the roles and functions of the knowledge broker the groups discussed personal qualities desired for an effective knowledge broker. The general qualities for making up a person who can be effective in working through the non-traditional format of a knowledge broker are: empathy with the client; credibility (perhaps having gone through similar experiences as the client or client group); a good knowledge of techniques and resources; and, good communication skills. These personal qualities obviously are the basis of a good learning facilitator and staff trainer.

The groups also discussed a further refinement of the needs assessment process mentioned during Dr. Knox's keynote address. In this context the discussion participants looked at needs assessment from the client's point of view -- the wants and needs felt by the individual who would be the primary focus for the knowledge broker. The groups also discussed what Dr. Knox classified as the "others" point of view. This perspective takes into account needs for training as perceived by administrators, supervisors, educators, clients of the system

and other such viewpoints initiating from an observation of the primary client who is the focus of the knowledge broker.

Another connection which was made between the knowledge broker concept and other similar concepts was desirability to have a good understanding of organization development strategies. Some of the strategies in OD which has a similar function to the knowledge broker are: helping to set mutual goals and objectives in the framework of individual and organizational needs; using the group process as the basis for problem solving; involving participants in setting objectives and other aspects of the planning process; and, helping to establish open and supportive administrative climates. Again, the focus here in on the facilitating role and the use of andragogical learning strategies to achieve change.

There is considerably more detail in the discussions which took place during the afternoon and evening sessions, but mostly those remarks serve to further define the concepts previously mentioned in this report. Although the groups were small at both sessions, the interest was high and the involvement considerable. None of the participants sat through the meetings without making some contribution. The individuals who attended the two meetings are listed below:

Nancy Doyle
Jim Greaves
Elizabeth Margutti
H. D. Kreilkamp
Peter Neeman
Katherine Ann Perry
Henry L. Alsmeyer, Jr.
Charles A. Bolles
Betty M. Nichols
K. Leon Montgomery
Betty Stone
Mary K. Feldman

Travis Tyer: Maybe the most worthwhile things we've reported to you this morning.

One of the general observations as I was hearing the reporters report on the discussion groups last night. It was coming through loud and clear that the sophistication of the people who were in attendance at the groups made the programs work. And although a great deal of the subject matter had to do very much with "how to" do, or "this is one way you could do", that the sophistication and level of the participants themselves made the discussion groups work.

Now while I still have the mike I want to point out to you that on your tables there is an evaluation form which those of us who will be doing the future -- the next -- CLENE Assembly would like for you to take rather seriously. An evaluation form is really a misnomer -- it's part evaluation and part information we need for the next time around.

I would like to thank all of you as participants for the discussion groups participation and the effort you put into it, and I really want to thank the reporters and the leaders, who did in their own style develop their materials and present us with a variety of new things to think about. At this time I'm going to turn the mike over to Nettie Taylor. Nettie?

Nettie Taylor: This is going to be very brief, because this almost brings to a conclusion these two days of the Assembly program. I want to particularly thank the members of the Task Force that planned the Assembly program for you. I think you've been introduced to them before, but I'd like to acknowledge them

again. Ruth Patrick, Travis Tyer, Pat Broderick, Muriel Fuller, Frank Birmingham, Mary Baxter from the CLENE staff.

This is my last appearance here as your President; now I can officially wear the badge I've had on the last two days that said "Past President." It's been a great pleasure, a great challenge, as I have said before, but it's really a pleasure for me at this time to turn this office over to Ruth Patrick and to have her say some things to you about the future.

Ruth Patrick: Thank you. Before I begin as President, I still have a few announcements connected with the Assembly Task Force. First of all a thank you to Duquesne and John Stuart for lending us the projector and saving us in a emergency situation. Jim Sucy says that he will be available in this room from 2:00 until 3:00, and that he has a complete set of the worksheets that he referred to if you would like to have a closer look at some of those.

So now as brand new president of CLENE for the upcoming year I first want to thank the membership for their support and election of me as president. I'm absolutely thrilled and challenged by this opportunity and I'm looking forward to working with all of you, the Assembly, the Advisory Committee, the Board and the CLENE staff, to have another totally productive year aimed at insuring quality continuing education opportunities for library, media, and information science personnel.

The second thing I want to do is to thank and commend Nettie Taylor for the tremendous job she has done as CLENE's first president in bringing CLENE

from merely an idea to the vital, alive reality that we see it is now. Related to that we have a motion from Maryann Duggan, who is the new vice-president of CLENE.

(Editor's note: At this point the transcription is not clear. Ms Duggan offered a motion recognizing the contribution of Nettie Taylor as first President of CLENE during its initial formative year, and offering the membership's thanks for her outstanding service. Her motion was passed by applause.)

Ruth Patrick: The third thing I want to do is get an early start on the address I'm going to have to make a year from now when it's my turn to give the progress report on CLENE, and what I want to do is outline the goals for CLENE for next year. Now, the Board will be addressing themselves to these goals as well as the Advisory Committee, and I invite you to, as well.

I have identified five goals. The first is rather an overarching one, and this is to make the accomplishments of the second year comparable to the first year and lay a sound foundation for the next five years. I feel, as do the members of the old and new Boards, that this second year in CLENE's life is going to be extremely crucial and we really do need the help of all of you in this second year.

The second goal is to maintain the four programs of CLENE, and many of you are familiar with those from previous presentations. For the newcomers these are the programs Margaret Myers referred to in her orientation. These are the things that all of us have to do if we are continuing education programmers. This has to be done at all levels, local, state, and national. First to assess what are the continuing education needs, what are the important problems that have to be addressed, such as the development of a recognition system, which is a high priority for us in the coming year; second, we have to acquire and coordinate information that is existing now about continuing education so that we really don't duplicate and waste our scarce resources; third, program -- knowing what the needs are, we then have to develop products addressed to those needs; fourth, we then have to communicate information about the first three programs to

those for whom we are doing this planning.

The third goal relates to the structure of CLENE, and I think we really have underlined the importance there is to the structure, especially the grass roots element and especially to the Assembly membership, and a high priority for us is going to be to strengthen the involvement of the membership in CLENE's activities.

One way we're going to do that is by our task forces, and if you haven't signed up for a task force now we do still have the sheets available. We're having the first meeting of our task forces this evening, 9:00 to 10:00 o'clock in Parlor A.

A second structural element, and this was brought up in some of the discussion yesterday, we want to get out more information about CLENE. There has been reference to developing some kind of a state information network, so we will be exploring this idea and the best way to do this. Possibly we can use the training institute for the state library personnel, who are going to be concerned with developing statewide education models or plans, as a way of involving all the members of that state in continuing education efforts.

Now to the fourth goal, and in this respect here, as the new Board we're going to be starting out really very well prepared, in the sense that the previous Board spent a substantial time preparing a planning document, helping us to identify what the priorities were for the upcoming year, so one of our goals will be to review this planning document and implement the activities that have been suggested in the planning document.

Now the fifth, final, and perhaps most crucial goal or priority for us will be to here again review our objectives, determine priorities, and seek funding from foundations, government sources. The U. S. Office of Education has been very generous to us, but we don't know if they still will be able to continue funding us and we want to implement all these great plans that we have. So basically what we want to do is develop a sound financial basis for CLENE.

It's relatively simple and a year from now I'll tell you how we've progressed on all these goals.

However, as I look at and think about CLENE, I really do recognize that CLENE has a problem, as well as the challenge and opportunities and all the excitement. Like many problems, it exists because of a mismatch between two things, what we want to exist in our desires and imagination, and the reality of what actually exists. We have great ideas on what we want to do -- many of them coming from you -- on what can and needs to be accomplished in providing quality continuing education opportunities. We also have limited resources.

What can we do?

Well, as I mentioned, we're going to be seeking funding and financial soundness. The second thing we're going to do, or at least that I am going to try to see that we do, is that we practice what we preach -- recognize the great value of our human resources, develop and use them. You, we, are CLENE's resources. We want to involve you in CLENE's work.

How can you become involved? I think in these two days you have heard many suggestions: You can sign up for a task force; you can write letters to the CLENExchange, a medium that we have that already exists for making sure that our ideas are publicized and get further uses -- share your ideas, your successes with us; you can work on your statewide plan for continuing education, form local continuing education committees, get your friends to join CLENE, you can join CLENE if you haven't joined yet, get your state library, your state association, your local library school to join and support CLENE. Communicate and keep in touch with each other, work on the friendships you've established in these two days. Implement the ideas that you've gotten at this Assembly. Don't write back to us and say "Why don't you implement it?" Why don't you implement it?

Fill out the evaluation form to help us in planning next year's Assembly, and get in your ideas on what you think the priorities should be for CLENE. The most important way you can become involved -- and it's the category that's always labeled on any questionnaire, it's the "Other" category -- this is for you to determine the best way for you to become involved in CLENE and ultimately benefit from CLENE.

I shall be asking each member of the Board, the Advisory Committee, to give some thought to how they can help achieve CLENE's goals for this new year, and I ask you the same question.

Because remember, we're involved with a vital matter here -- the updating of ourselves, our constituents, to master and to adapt to all the changes taking place in our society -- technological, with the new computer networks that we read about every day; economic, the budget realities; and social, with all the demands from the new groups that want to be served with library and information resources. We're involved with the lifelong learning of ourselves, our constituents, and of our users, pursuing knowledge and information so that we all may grow and renew ourselves and seel self-fulfillment.

Indeed, CLENE is more than an association -- it is an organization. And you are more than stockholders, you are stakeholders. We all have a personal stake in CLENE's future.

I ask for your support for CLENE, your ideas for CLENE, your energy for CLENE, your power for CLENE.

Thank you.

The meeting is now adjourned.

CONTINUING LIBRARY EDUCATION NETWORK AND EXCHANGE

ASSEMBLY PARTICIPANTS

JULY 16 -- 17, 1976

Sterling J. Albrecht
Assistant Director of Libraries
324 HBLL
Brigham Young University
Provo, UT 84602

Lawrence A. Allen
Professor
College of Library Science
University of Kentucky
Lexington, KY 40506

Henry L. Alsmeyer, Jr.
Associate Director of Libraries
Texas A & M University Libraries
College Station, TX 77843

John Aubry
Coordinator, Library Systems
Five Associate University Libraries
757 Ostrom Avenue
Syracuse, NY 13210

Joyce Ball
Assistant Director of Libraries
Box 8352 University Station
University of Nevada
Reno, NV 89507

Marilyn Balam
Reference Librarian
Maw Library
Indiana University
Bloomington, IN 47401

Mary Baxter
CLENE Staff
620 Michigan Avenue, N.E.
Washington, DC 20064

Frank Birmingham
Program Leader
Instructional Media and Technology
Mankato State University
Mankato, MN 56001

Charles Bolles
Associate Professor
School of Library Science
Emporia Kansas State College
Emporia, KS 66801

Patricia M. Broderick
Director of Library Development
Pennsylvania State Library
Box 1601
Harrisburg, PA 17126

Robert Brown
Assistant Director
Graduate School of Library Science
University of Illinois
Urbana, IL 61801

Susan Bullock
Cheshire Public Library
104 Main Street
Cheshire, CT 06410

Kathleen E. Burgess
Head, Continuing Education
Gary Public Library
220 West 5th Avenue
Gary, IN 46402

Nancy Bush
315 Cherry Street
Auburn, AL 36830

Thomas Cahalan
Assistant Librarian for Acquisitions
Northeastern University Libraries
Boston, MA 02115

Dale Carrison
Director of Libraries
Mankato State University
Mankato, MN 56001

Genevieve Casey
Professor
Division of Library Science
Wayne State University
315 Kresge Street
Detroit, MI 48202

Vivian Cazayoux
Associate State Librarian
Louisiana State Library
1447 Kenmore Avenue
Baton Rouge, LA 70808

Arlene Chamberlain
Director of Library Personnel
Chicago Public Library
78 East Washington Street
Chicago, IL 60602

Harry Clark
Associate Professor
School of Library Science
University of Oklahoma
Norman, OK 73069

Eileen Cohen
Master's Student
Library School
University of Wisconsin, Madison
Madison, WI 53706

Jean Connor
Library Consultant
Westville Apartments
Farnsworth Drive
Slingerlands, NY 12159

Barbara Conroy
Education Consultant
Box 502
Tabernash, CO 80478

Marile Creager
Assistant Director
Tacoma Public Library
1102 Tacoma Avenue, South
Tacoma, WA 98402

Joanne Crispin
Director, Library
Lutheran General Hospital
1775 Dempster Street
Park Ridge, IL 60068

Evelyn Daniel
Associate Professor
School of Information Studies
Syracuse University
Syracuse, NY 13210

Katherine E. Davis
Public Library Consultant
State Library of Florida
Tallahassee, FL 32301

Dorothy Deininger
Principal Investigator
CLENE
620 Michigan Avenue, N.E.
Washington, DC 20064

Eleanor L. Dempster
Staff Development Librarian
University of Tennessee
Knoxville, TN 37916

Nancy Doyle
Director
Adult Continuing Education
Forsyth County Public Library
660 West 5th Street
Winston-Salem, NC 27101

Maryann Duggan
Director
Veteran's Administration Library
2404 West State Street
Boise, ID 83702

Joan C. Durrance
Instructor, Community Inormation
Specialist Program
Department of Library and Information
Service
University of Toledo
Toledo, OH 43606

Lenna Easter
Manager, Information Center
Calgon Corporation
P.O. Box 1346
Pittsburgh, PA 15230

Sandra Ellison
Public Library Consultant
Oklahoma Department of Libraries
200 NE 18th Street
Oklahoma City, OK 73105

Donald P. Ely
Director
Center for the Study of
Information and Education
Syracuse University
Syracuse, NY 13210

Mary K. Feldman
Chief, Cataloging Section
Department of Transportation Library
400 Seventh Street, S.W.
Washington, DC 20590

Bernard Franckowiak, Director
Bureau of School Library Media
Programs
Department of Public Instruction
126 Langdon Street
Madison, WI 53702

Muriel L. Fuller
Professor
University of Wisconsin, Madison
Library School
Madison, WI 53706

Marilyn Gell
Chief of Library Programs
Metropolitan Washington Council of
Governments
1225 Connecticut Avenue, N.W.
Washington, DC 20036

Kathryn Gesterfield, Director
Illinois State Library
209 Centennial Building
Springfield, IL 62756

Wayne Gossage
Library Director
Bank Street College of Education
610 West 112th Street
New York, NY 10025

James E. Greaves
Assistant Reference Librarian
Reference Department
Indiana University Library
Indiana University
Bloomington, IN 47401

Nancy Greer
Head
Catalog Maintenance Department
Denver Public Library
Denver, CO 80218

Donald Haynes
State Librarian
Virginia State Library
Richmond, VA 23219

Jacqueline Headly
Adult Services Coordinator
Lake County Public Library
1919 West Lincoln Highway
Merrillville, IN 46410

Betsy Hearne
Editor, BOOKLIST
American Library Association
50 East Huron Street
Chicago, IL 60611

Howard Hitchens
Executive Director
Association for Educational
Communications and Technology
1201 16th Street N.W.
Washington, DC 20036

Mary T. Howe
Director
Starved Rock Library System
Hitt and Swanson Streets
Ottawa, IL 61350

Carol Johnson
Director
Research Library
Air Force Geophysics Library
Bedford, MA 02193

Neal Kaske
Associate Librarian
416 Doe Library
Library Systems Office
University of California
Berkeley, CA 94720

Kevin J. Keaney
Chief, D.C. Branch
National Agricultural Library
U.S. Department of Agriculture,
Room 1052 - S
Washington, DC 20250

Brigitte L. Kenney
Associate Professor
Graduate School of Library Science
Drexel University
Philadelphia, PA 19104

David E. King
Librarian
Editorial Library
Standard Education Corporation
130 North Wells Street
Chicago, IL 60606

Alan B. Knox
Professor of Continuing Education
Director of the Office of Continuing
Education and Public Services
University of Illinois
Urbana, IL 61801

Charles A. Kozoll
Associate Director
Office of Continuing Education
and Public Services
University of Illinois
Urbana, IL 61801

H.D. Kreilkamp
Assistant Librarian
St. Joseph's College
Collegeville, IN 47978

Bridget L. Lamont
Consultant
Library Development Group
Illinois State Library
209 Centennial Building
Springfield, IL 62756

A. Venable Lawson
Director
Division of Librarianship
Emory University
Atlanta, GA 30322

Thomas P. Lewis
Assistant Manager
School and Library Promotion Department
Harper and Row, Publishers
10 East 53rd Street
New York, NY 10022

Rita Lichtenburg
Reference Librarian
Undergraduate Library
Indiana University
Bloomington, IN 47401

G. Elizabeth Lindsey
Specialist in Continuing Education
State Library
735 East Michigan Avenue
Lansing, MI 48919

Paul Little
Chief of Extension Services
Oklahoma County Library System
131 Northwest Third Street
Oklahoma City, OK 73102

Marcia Lowell
State Librarian
Oregon State Library
Salem, OR 97310

Mary Niles Maack
Library School Faculty
419 Walter Library
University of Minnesota
Minneapolis, MN 55414

John McCrossan
State Librarian
State Library of Vermont
111 State Street
Montpelier, VT 05602

Gil McNamee
Director
Bay Area Reference Center
San Francisco Public Library
Civic Center
San Francisco, CA 94102

Suzanne H. Mahmoodi
Visiting Lecturer/ PhD Candidate
University of Minnesota
Library School
Minneapolis, MN 55455

Elizabeth Margutti
Assistant Librarian
R & I S Department
Love Library
San Diego State University
San Diego, CA 92115

Catherine Maun
Coordinator, LTA Program
College of DuPage, Omega College
Glen Ellyn, IL 60137

Melissa B. Mickey
Reference Librarian
Library Industrial Relations Center
1225 East 60th Street
Chicago, IL 60637

Helen M. Miller
State Librarian
Idaho State Library
325 West State Street
Boise, ID 83702

Shirley C. Mills, Director
Miracle Valley Region
700 5th Street
Moundsville, WV 26041

Margaret Monroe
Professor
Library School
University of Wisconsin
600 North Park Street
Madison, WI 53706

Eleanor Montague
Director
WICHE / WILCO
P.O. Drawer P
Boulder, CO 80301

K. Leon Montgomery
Associate Professor
Interdisciplinary Department of
Information Science
Room 721, LIS Building
University of Pittsburgh
Pittsburgh, PA 15260

Schuyler Mott
Director
Ocean County Library
15 Hooper Avenue
Toms River, NJ 08753

Bessie Boehm Moore
Vice Chairman
National Commission on Libraries
and Information Science
State Department of Education
Education Building, State Capitol
Little Rock, AR 72201

Mary G.H. Mueller
Instructor and Librarian
Bio-Medical Library
University of Minnesota
Minneapolis, MN 55455

Charlotte Mugnier
Associate Professor
Graduate School of Library Science
University of Alabama
Birmingham, AL 35294

Margaret Myers
Director
Office for Library Personnel Resources
American Library Association
50 East Huron Street
Chicago, IL 60611

Peter Neenan
Doctoral Student
Library School
University of Wisconsin
Madison, WI 53707

James A. Nelson
Director, Continuing Education
College of Library Science
University of Kentucky
Lexington, KY 40506

Betty Nichols
Supervisor, Continuing Education
Kansas City Public Library
311 East 12th Street
Kansas City, MO 64106

Peggy O'Donnell
Coordinator of Continuing Education
CELS
Southwestern Library Association
7371 Paldao Drive
Dallas, TX 75240

Ruth Patrick
Coordinator of Continuing Education
School of Information Studies
Syracuse University
Syracuse, NY 13210

Shirley N. Pelley
Social Science Librarian
University of Oklahoma
401 West Brooks Street
Room 210
Norman, OK 73069

Katherine Ann Perry
Acting Director, Information Center
Public Technology, Inc.
1140 Connecticut Avenue, N.W.
Washington, DC 20036

Sydelle Popinsky
Coordinator of Personnel Enrichment Program
Northern Illinois Library System
211 North Wyman Street
Rockford, IL 61105

Mary Power
Executive Director
Health & Rehabilitation Library Servic
American Library Association
50 East Huron Street
Chicago, IL 60611

Neil V. Price
Chairperson
Department of Library Science and Audio-Visual Instruction
University of North Dakota
University Station, Box A
Grand Forks, ND 58202

Nancy Sanders
Adminstrative Assistant
Main Library
Indiana University
Bloomington, IN 47401

John Schere
Associate Director
Nebraska Library Committee
1420 "P" Street
Lincoln, NE 68508

Bernard S. Schlessinger
Professor
University of South Carolina
College of Librarianship
Columbia, SC 29208

Susan K. Schmidt
Coordinator Library Institute
Appalachian Adult Education Center
P.O. Box 1356
Morehead, KY 40351

Brooke Sheldon
Doctoral Student
Graduate School of Library and
Information Science
Pittsburgh, PA 15260

Joseph Shubert
State Librarian
State Library of Ohio
Columbus, OH 43215

Hester B. Slocum
Assistant City Librarian
New Orleans Public Library
219 Loyola Avenue
New Orleans, LA 70140

Barbara Smith
Coordinator
Commonwealth Campus Libraries
East 505 Pattee Street
Pennsylvania State University
University Park, PA 16802

Dorothy Snowden
Associate Editor
Booklist
American Library Association
50 East Huron Street
Chicago, IL 60611

Carolyn Snyder
Personnel Librarian
Indiana University Libraries
Indiana University
Bloomington, IN 47401

Vida Stanton
Assistant Professor
School of Library Science
University of Wisconsin, Milwaukee
Milwaukee, WI 53201

Frank A. Stevens
Chief, Library Education Branch
Division of Library Programs
U.S. Office of Education
400 Maryland Avenue, S.W.
Attn: Rm. 3319 A ROB-3
Washington, DC 20202

Elizabeth W. Stone
Executive Director
CLENE
620 Michigan Avenue, N.E.
Washington, DC 20064

Nan Sturdivant
Administrative Assistant
for Personnel Development
Tulsa City - County Library System
Tulsa, OK 74103

James Sucy
Manager
Education Markets Services
Eastman Kodak Company
Rochester, NY 14650

Judith Sutton
Adult Services Consultant
Department of Cultural Resources
Division of State Library
109 East Jones Street
Raleigh, NC 27611

Roderick Swartz
State Librarian
Washington State Library
Olympia, WA 98501

Diana Yu Swenson
Indiana Vocational Technical College
1315 East Washington Street
Indianapolis, IN 46202

Nettie B. Taylor
Assistant State Superintendant
for Libraries
Division of Library Development and
Services
Maryland State Department of Education
P.O. Box 8717
Baltimore-Washington International
Airport
Baltimore, MD 21240

Alphonze Trezza
Executive Director
National Commission on Libraries
and Information Science
1717 K Street N.W.
Washington, DC 20036

Travis Tyer
Senior Consultant
Professional Development
Library Development Group
Illinois State Library
209 Centennial Building
Springfield, IL 62756

Pauline Vaillancourt
Associate Professor and Consultant
School of Library and Information
Science
State University of New York, Albany
1400 Washington Avenue
Albany, NY 12222

Joyce Veenstra
Assistant Personnel Librarian
317A Butler Library
Columbia University
114th Street and Broadway
New York, NY 10027

Julie A. Virgo
Director of Education
Medical Library Association
919 North Michigan Avenue
Chicago, IL 60611

Barbara von Wahlde
Staff Development Coordinator
Sterling Library
Yale University
New Haven, CT 06520

Raymond F. Vondran, Jr.
Assistant Professor
Department of Library Science
Catholic University of America
Washington, DC 20064

Jan Waffle
Supervisor - Bookmobiles
Austin Public Library
Box 2287
Austin, TX 78767

H.T. Walker
Specialist - Staff Development
Division of Library Development
and Services
Baltimore Washington International
Airport
Box 8717
Baltimore, MD 21240

Ruth Warncke
(Retired Deputy Executive Director
American Library Association)
222 East Pearson Street
Apartment 1605
Chicago, IL 60611

Barbara Weaver
Regional Administrator
Central Massachusetts Regional
System
Worcester Public Library
Salem Square
Worcester, MA 01608

Kathleen Weibel
Doctoral Student
Library School
University of Wisconsin
Madison, WI 53706

J. Madison Whitehead
Law Librarian
College of William and Mary
104 Hurst Street
Williamsburg, VA 23185

Matthew R. Wilt
Executive Director
Catholic Library Association
461 West Lancaster Avenue
Haverford, PA 19041

Norma Wood
Head, Technical Services Department
East Chicago Public Library
2401 East Columbus Drive
East Chicago, IN 46312

Blanche Woods
Associate Professor
Graduate School of Library and
Information Science
University of Pittsburgh
Pittsburgh, PA 15260

Judith T. Yamamoto
Assistant Director
Illinois Regional Library Council
425 North Michigan Avenue
Suite B 66
Chicago, IL 60611

Jane Younger
Consultant Adult Services
Wisconsin State Library Division
Wisconsin Department of Public
Instruction
Madison, WI 53702

Nancy Zeidner
SPEC Coordinator
Association of Research Libraries
1527 New Hampshire Avenue, N.W.
Washington, DC 20036

CLENE

FACT SHEET

IS: the Continuing Library Education Network and Exchange--
a unique, nation-wide resource and service facility.

DEDICATED TO: ...the aim of increasing the quality and availability of continuing education opportunities for library/information/media personnel;
...the need for all publics to have equal access to information and library service.
CLENE seeks to develop, through multiprofessional approaches, innovative solutions to national problems related to these concerns.

PROVIDES: An opportunity for library/information/media personnel to exchange ideas with each other--and with educators, with practitioners in allied professions, with developers of the technologies, with local, state and federal officials.

ACCOMPLISHED IN YEAR #1:

- ✲ a directory of nation-wide continuing education opportunities
- ✲ a directory of CLENE members that singles out the leaders to develop and implement CE programs
- ✲ the CLENExchange newsletter that regularly reports on what's happening
- ✲ an annotated bibliography of multiprofessional CE resources
- ✲ concept papers on planning and teaching CE programs
- ✲ obtained a proposal funded for training state library agency personnel responsible for CE
- ✲ and a research grant to develop a model CE recognition system
- ✲ its most distinctive feature: a computer-based network that serves five groups:
  1. practitioners, seeking information about available CE opportunities
  2. providers of CE opportunities, wanting to disseminate information about their programs
  3. continuing education leaders, looking for available programs
  4. state agencies, institutions, and associations, requiring programs to transport to their locales
  5. planners concerned with manpower development and education--the network shows what exists and indicates the gaps

CURRENTLY IS DEVELOPING:

- ✲ a profession-wide model for the recognition of participation in CE programs
- ✲ a home-study program on the impact of the new technologies
- ✲ plans for programs that can travel anywhere
- ✲ papers on tools for program evaluation and needs assessment
- ✲ recommended criteria for continuing education programs
- ✲ consulting services
- ✲ program reviews
- ✲ methods for assisting those who market learning resources
- ✲ ways to facilitate the delivery of existing CE programs
- ✲ proposals to meet those needs that have been identified
- ✲ a year-long program for training those responsible for CE in state agencies
- ✲ exchange of materials, packages, and ideas that have been produced by other developers

CONTINUING LIBRARY EDUCATION NETWORK AND EXCHANGE
620 Michigan Avenue, N.E.
Washington, D.C. 20064
(202) 635 5085

PLEASE TURN OVER

CLENE HAS ARRIVED.....AND IT TOOK A LOT OF MONEY TO MAKE THE TRIP

CLENE has accomplished a lot in its first year in a lot of different ways--all leading toward increased quality. But it takes a lot more than dedication and hard work. It takes money...a lot of money. Money for staff, for printing, for mailing, for computer service, for promotional materials, for Assembly meetings, and for more program development.

The problem is really quite simple. CLENE needs money to continue its basic services. Grants and contracts are fine for new programs but they almost never renew money for ongoing services--such as the data base and directories and assemblies and newsletter that have already been developed.

You--through your membership in CLENE--are the only way we can continue our programs.

As CLENE's services make their impact on the profession, the level of service and the quality of leadership will be improved. Every person in the profession is bound to benefit. It is only through cooperation of all concerned groups and individuals that quality information and library service can be assured to all of our communities.

We invite you to join with those leaders, state agencies, associations, library schools, and libraries who are already investing in the future.

Join CLENE today.

CLENE WAS DESIGNED TO SERVE YOU. PARTICIPATE IN IT, EVALUATE IT, INFORM IT, GIVE IT YOUR IDEAS. JOIN IT BY FILLING OUT THE MEMBERSHIP FORM PRINTED BELOW:

MEMBERSHIP FORM

JOIN CLENE now by selecting your membership category and sending in dues.
To: CLENE, Inc., Box 1228, 620 Michigan Ave. NE, Washington, DC 20064

Name (Please Print) _____

Mailing Address _____

City _____ State _____ Zip _____

Phone (area code included) _____ ( ) Business or ( ) Home

( ) Individual Membership - $10.00 (Check enclosed)

( ) Institutional/Association Membership - $200; ( ) Check enclosed
( ) Please invoice

Official Delegate _____

( ) Sustaining Membership - $1,500 ( ) Check enclosed ( ) Please invoice

Official Delegate _____

*** Assembly Registration: Member - $25.00 ( ) Non-member - $35.00 ( )